

# Manager Task Aid

## Task Aid Titles

- Log On
- Forgot Password
- Request an Account using a SAAR Form
- View User Record
- Edit User Record
- Edit Record via Advanced Form
- View Transcript
- View Transcript Status
- Search for a User
- View User's Record
- View User's Transcript
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- View Standard Reports
- View Custom and Shared Reports
- Filter and Download Shared and Custom Reports

*To foster a high-performing,  
qualified civilian acquisition  
workforce.*



<https://www.fai.gov/>



FAI@mail.mil

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# User Account Management



# Log On

*When you want to login...*

**Step 1:** Go to URL: <https://dau-stg.csod.com> (do not use the Internet Explorer browser). You may want to log out of VPN before starting this process.

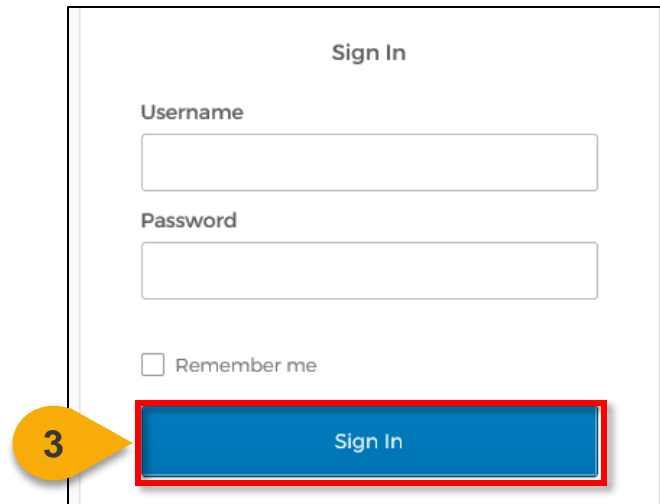


**Step 2:** The log on window will pop up. Enter your **Username** (your email) and **Password** in their respective fields.

A screenshot of the DAU Sign In window. The window has a white background with a light gray border. At the top, the DAU logo is displayed in red. Below the logo is a gray silhouette of a person's head and shoulders. Underneath the silhouette, the text "Sign In" is centered. Below this, there are two input fields: "Username" and "Password". A red rectangular box highlights both input fields. A yellow callout bubble with the number "2" points to the "Username" field. Below the input fields is a checkbox labeled "Remember me". Below the checkbox is a blue button labeled "Sign In". Below the button is a horizontal line with the text "OR" in the center. Below the line is a blue button labeled "Sign in with CAC Card". At the bottom of the window, the text "Need help signing in?" is displayed.

# Log On (Cont.1)

**Step 3: Click Sign In.**



Sign In

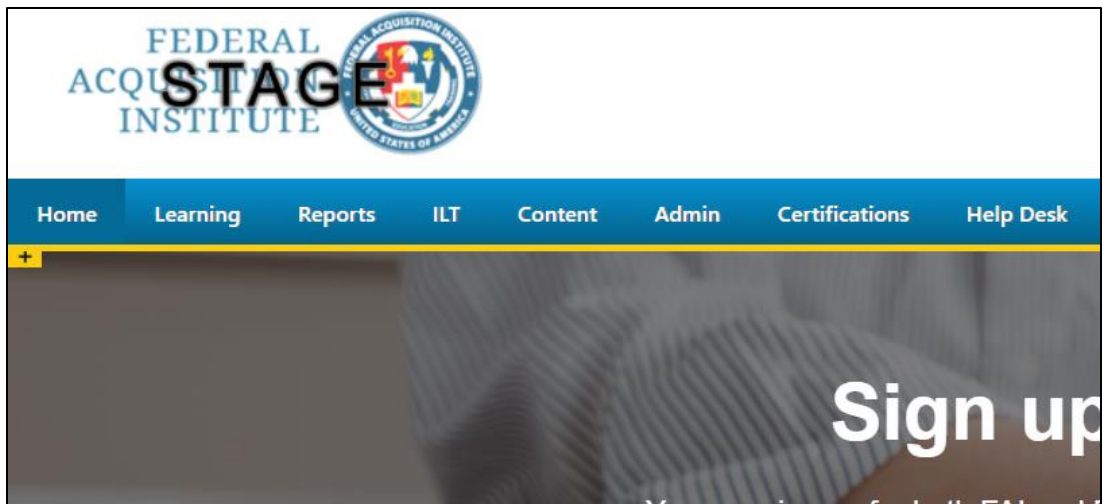
Username

Password

☐ Remember me

**3** Sign In

Once you successfully complete the SSO log in process, CSOD should open with your organization's logo in the upper left corner.



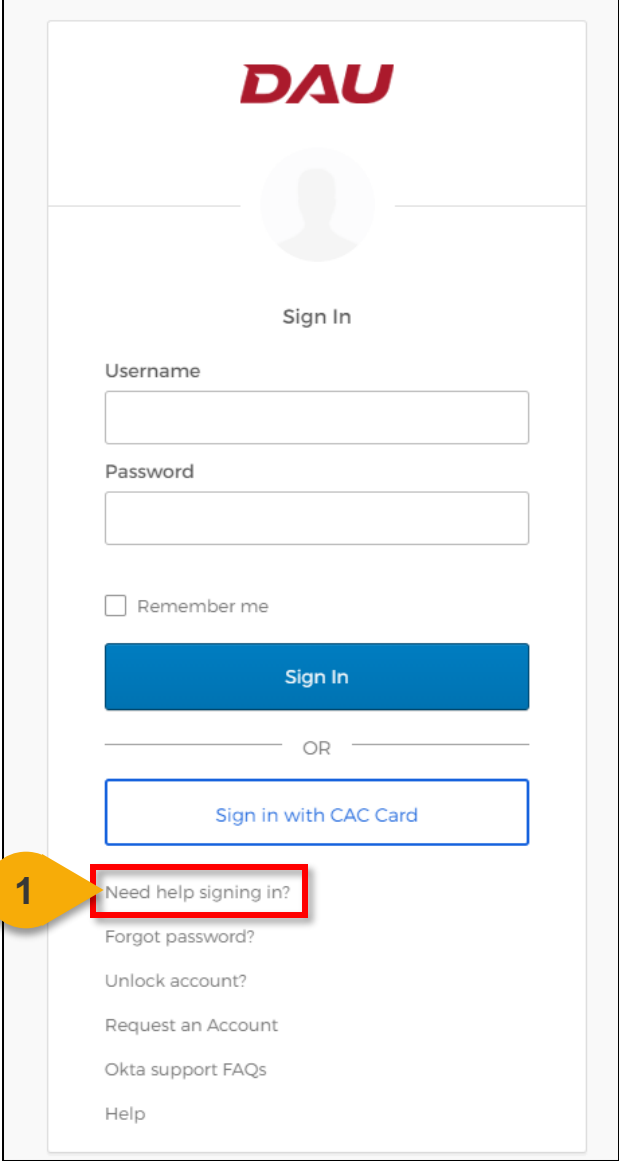
**NOTE:** If you receive an error message:

- Clear your cache
- Try a different browser
- Disconnect from the VPN

# Forgot Password

*When you can't log on...*

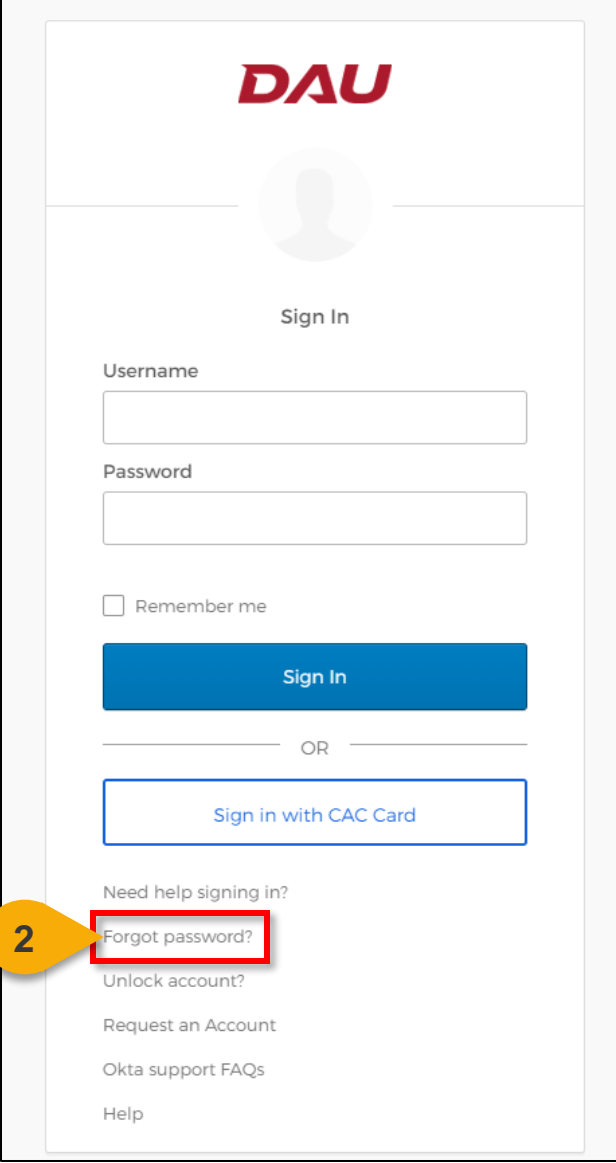
**Step 1:** If you need help signing in, select the **Need help signing in?** link at the bottom of the window.



The screenshot shows the DAU Sign In page. At the top is the DAU logo. Below it is a placeholder for a user profile picture. The text "Sign In" is centered. There are two input fields: "Username" and "Password". Below these is a checkbox labeled "Remember me". A blue "Sign In" button is present. Below the button is the word "OR" and a button labeled "Sign in with CAC Card". At the bottom, there is a list of links: "Need help signing in?", "Forgot password?", "Unlock account?", "Request an Account", "Okta support FAQs", and "Help". A yellow callout bubble with the number "1" points to the "Need help signing in?" link, which is also highlighted with a red rectangular box.

# Forgot Password (Cont.1)

**Step 2:** If you already set up OKTA to reset your password, select the **Forgot Password?** option to have a new password/PIN sent to your email or phone.



The image shows the DAU (Department of Acquisition) Sign In page. At the top is the DAU logo in red. Below it is a grey silhouette of a person's head and shoulders. Underneath the silhouette is the text "Sign In". Below that are two input fields: "Username" and "Password". Below the password field is a checkbox labeled "Remember me". Below the checkbox is a blue button labeled "Sign In". Below the button is the word "OR" flanked by horizontal lines. Below "OR" is a blue button labeled "Sign in with CAC Card". Below the buttons is a list of links: "Need help signing in?", "Forgot password?", "Unlock account?", "Request an Account", "Okta support FAQs", and "Help". A yellow callout bubble with the number "2" points to the "Forgot password?" link, which is also highlighted by a red rectangular box.



# Forgot Password (Cont.2)

**Step 3:** Select the OKTA support FAQs option and follow the directions for **Q2**.

**3**

**Q2: HELP! I requested a password be sent to me via email, but there is not a password in the email I was sent. Where is my password?**

**DAU - Okta Password Reset Requested**

Hi Teresa,

A password reset request was made for your Okta account. If you did not make this request, please contact the DAU Help Desk [dauhhelp@dau.edu](mailto:dauhhelp@dau.edu) immediately.

If you require further assistance, please view the Okta support FAQs or contact the DAU Help Desk using the options below:

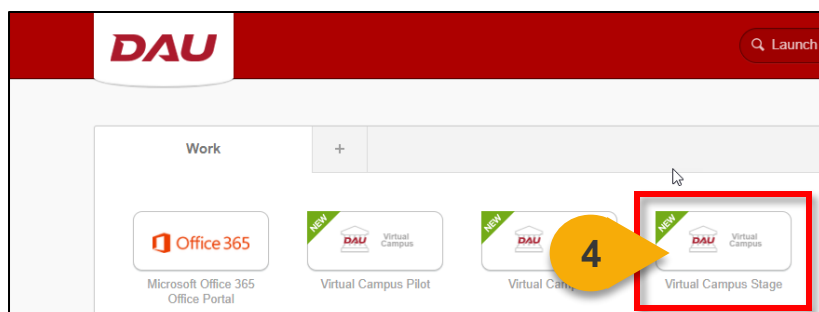
[Okta support FAQs](#)

Phone: [703-805-3459](tel:703-805-3459) | [866-568-6924](tel:866-568-6924) | DSN: 655-3459; All Option 1

Email: [dauhhelp@dau.edu](mailto:dauhhelp@dau.edu)

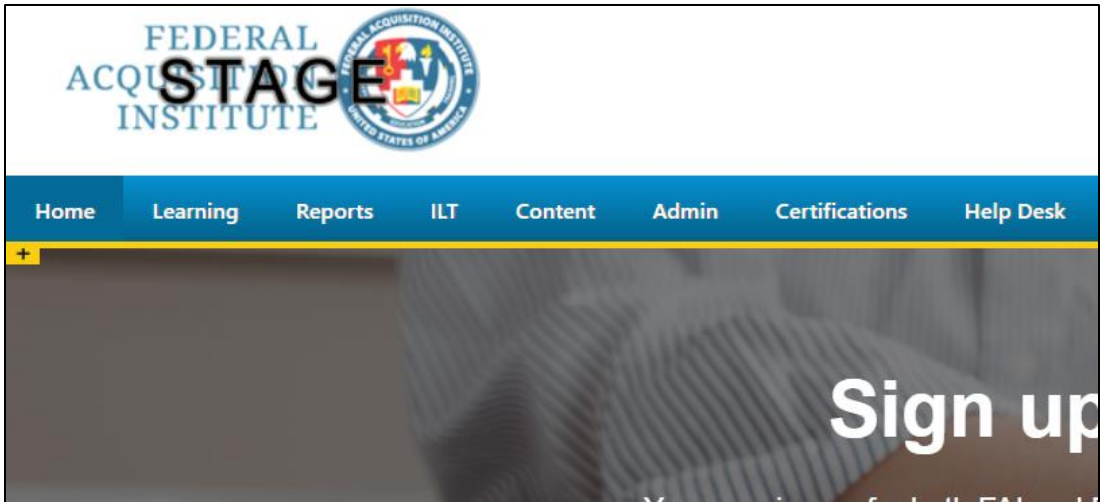
**A:** If you have not completed the account setup process, you will not be able to use the self-service feature to reset your own password. You need to request the DAU Help Desk ([DAUHelp@dau.edu](mailto:DAUHelp@dau.edu)) provide you with your login informatin so you can officially setup your account. Include the last 4 of your SSN/EIN/FIN when submitting this request so your account can be validated.

**Step 4:** Once you have the username and password entered, the list of systems you have access to will pop up. Select the **Virtual Campus Stage** button.



# Forgot Password (Cont.3)

Once you successfully complete the SSO log in process, CSOD should open with your organization's logo in the upper left corner.



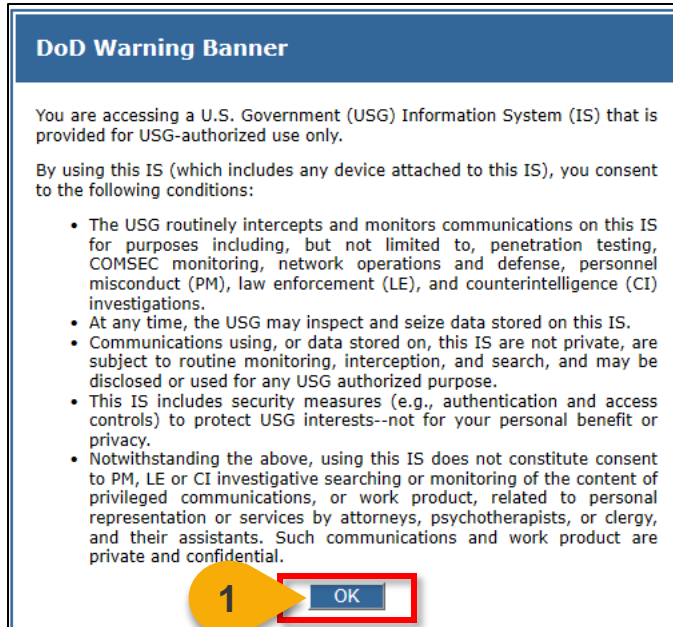
**NOTE:** If you receive an error message:

- Clear your cache
- Try a different browser
- Disconnect from the VPN

# Request an Account Using the SAAR Form

When you need to complete the DAU SAAR for access to the Virtual Campus...

**Step 1:** Navigate to <https://saar.dau.edu>. You will see a DoD Warning Banner. Click "Ok".

A screenshot of a DoD Warning Banner. The banner has a blue header with the text "DoD Warning Banner". Below the header, the text reads: "You are accessing a U.S. Government (USG) Information System (IS) that is provided for USG-authorized use only. By using this IS (which includes any device attached to this IS), you consent to the following conditions:". A list of five conditions follows, detailing USG interception and monitoring capabilities, data inspection and seizure, routine monitoring of communications, security measures, and the non-constitutive nature of using the IS for consent to investigation. At the bottom right of the banner, there is a blue button labeled "OK". A yellow callout bubble with the number "1" points to the "OK" button.

**DoD Warning Banner**

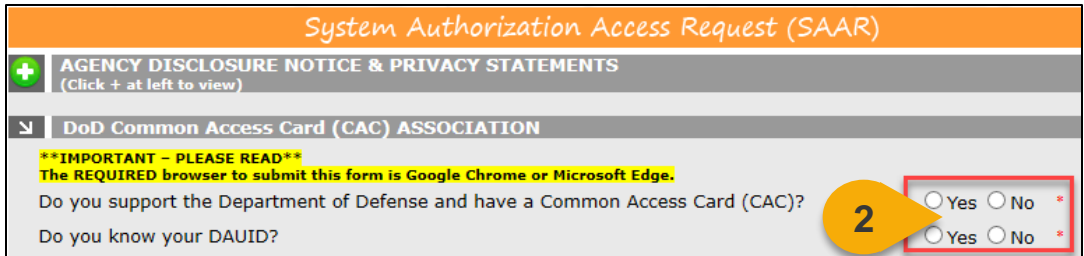
You are accessing a U.S. Government (USG) Information System (IS) that is provided for USG-authorized use only.

By using this IS (which includes any device attached to this IS), you consent to the following conditions:

- The USG routinely intercepts and monitors communications on this IS for purposes including, but not limited to, penetration testing, COMSEC monitoring, network operations and defense, personnel misconduct (PM), law enforcement (LE), and counterintelligence (CI) investigations.
- At any time, the USG may inspect and seize data stored on this IS.
- Communications using, or data stored on, this IS are not private, are subject to routine monitoring, interception, and search, and may be disclosed or used for any USG authorized purpose.
- This IS includes security measures (e.g., authentication and access controls) to protect USG interests--not for your personal benefit or privacy.
- Notwithstanding the above, using this IS does not constitute consent to PM, LE or CI investigative searching or monitoring of the content of privileged communications, or work product, related to personal representation or services by attorneys, psychotherapists, or clergy, and their assistants. Such communications and work product are private and confidential.

1 OK

**Step 2:** Click the **radio buttons** to answer the questions regarding having a DoD CAC and/or DAUID.

A screenshot of the System Authorization Access Request (SAAR) form. The form has an orange header with the text "System Authorization Access Request (SAAR)". Below the header, there are two sections: "AGENCY DISCLOSURE NOTICE & PRIVACY STATEMENTS" and "DoD Common Access Card (CAC) ASSOCIATION". The "DoD Common Access Card (CAC) ASSOCIATION" section contains a yellow box with the text "\*\*IMPORTANT - PLEASE READ\*\* The REQUIRED browser to submit this form is Google Chrome or Microsoft Edge." Below this, there are two questions: "Do you support the Department of Defense and have a Common Access Card (CAC)?" and "Do you know your DAUID?". Each question has two radio buttons: "Yes" and "No". A yellow callout bubble with the number "2" points to the "Yes" radio button for the first question.

**System Authorization Access Request (SAAR)**

**AGENCY DISCLOSURE NOTICE & PRIVACY STATEMENTS**  
(Click + at left to view)

**DoD Common Access Card (CAC) ASSOCIATION**

**\*\*IMPORTANT - PLEASE READ\*\***  
The REQUIRED browser to submit this form is Google Chrome or Microsoft Edge.

Do you support the Department of Defense and have a Common Access Card (CAC)? ☐ Yes ☐ No \*

Do you know your DAUID? ☐ Yes ☐ No \*

2

**NOTE:** If you support the Department of Defense and have a Common Access Card (CAC), the system can determine if there is already a DAUID associated to your information. If you select "Yes" and the system does find your account, the fields for your DAUID, Name, and Email address under PERSONAL DETAILS will automatically be filled in.

# Request an Account Using the SAAR Form (Cont.1)

**Step 3:** Under SYSTEM ASSOCIATION you must select “**Virtual Campus (Online Training)**”. If you choose one of the other options, this will significantly delay the process to have an account created to take a course.

**SYSTEM ASSOCIATION**

Please select a system for which you are requesting access

3 Virtual Campus (Online Training)

Industry Students (Classroom Registrations Only)

DAU Homepage (Knowledge Sharing)

**Step 4:** Enter the required information in all fields that have not been grayed out.

**PERSONAL DETAILS**

Foreign National students without a DoD CAC or DAUID can visit the [FAQ website](#) for guidance on establishing an account. DAU account holders must also update their profile in the DAU Identity Management System. Further guidance is provided after completing this form.

Citizenship Type [dropdown] \* Designation [dropdown] \*

SSN/FIN [text] \*

DAUID [text] \*

First Name [text] \* Organization [Please Select..] \*

Supervisor Email [text] \*

**Step 5:** Enter your **SUPERVISOR DETAILS**.

**SUPERVISOR DETAILS**

First Name [text] \* Last Name [text] \*

Supervisor Email [text] \* Supervisor Phone [text] \*

# Request an Account Using the SAAR Form (Cont.2)

**Steps 6 & 7:** Read the USER AGREEMENT and check the “**I Agree**” box. Enter the code, which is not case sensitive, from the image in the box. You can select the green arrows to generate a new code or select the green sound image for the code to be vocalized. Afterwards select the “**Submit**” button.

The screenshot shows a web form titled "USER AGREEMENT". The text of the agreement is as follows: "I accept the responsibility for the information and DoD system to which I am granted access and will not exceed my authorized level system access. I understand that my access may be revoked or terminated for non-compliance with DoD security policies. I accept responsibility to safeguard the information contained in these systems from unauthorized or inadvertent modification, disclosure, destruction and use. I understand and accept that my use of the system may be monitored as part of managing the system, protecting against unauthorized access and verifying security problems. I agree to notify the appropriate organization that issued my account(s) when the access is no longer required."

Below the text, there is a checkbox labeled "I Agree" with a red box around it and a yellow callout bubble with the number "6" pointing to it. To the right of the checkbox is a CAPTCHA image showing the code "30016" with a green arrow pointing to it and a yellow callout bubble with the number "7" pointing to it. Below the CAPTCHA image is a text input field with the placeholder "Type the code from the ir" and a green arrow pointing to it. Below the input field is a red error message: "The code is not case sensitive."

To the right of the CAPTCHA image is a "SUBMIT" button with a red box around it and a yellow callout bubble with the number "7" pointing to it.

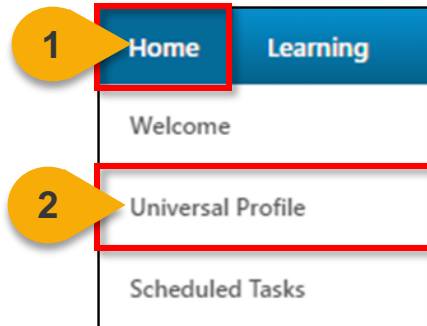
At the bottom of the form, there are links for "Contact Us" and "Suggestion Box", and contact information for the DAU Help Desk: "703-805-3459" and "1-866-568-6924".

**IMPORTANT:** If there was any information that was not filled in correctly, there will be red text in the area of the form that requires your attention for correction. Afterwards, you will need to select the “**I Agree**” check box again and enter the new code in the image box for your SAAR to be submitted. Select the “**Submit**” button once you have completed the form. Afterwards the screen below will be generated.

# View User Record

*When you want to view your User Record...*

**Steps 1 & 2:** Hover over the **Home** tab, then select the **Universal Profile** tab. You will be taken to the User Record page.



**Step 3:** To expand a section, click on the **arrow** to the right of that section.

A screenshot of the User Record page. The 'Contact' section is expanded, showing fields for Phone, Email, Personal Email, and Mobile. The 'Settings' section is collapsed, indicated by a blue arrow icon. The 'Organization Structure' section is also collapsed, indicated by a blue arrow icon. A yellow callout bubble with the number '3' points to the blue arrow icon next to the 'Contact' section header.

**Contact**

Phone: Email:

Personal Email: Mobile:

**Settings**

Time Zone:

**Organization Structure**

Manager: HR Admin:

Dean or Director: Organization: Department of Education (9AL3)

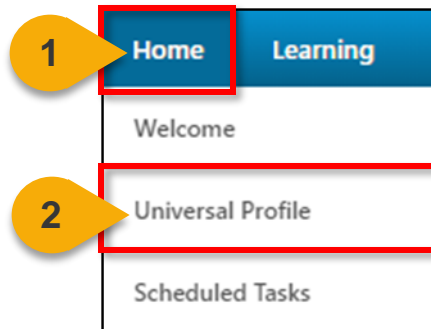
Position: Grade:

Location:

# Edit User Record

*When you want to edit information on the user record...*

**Steps 1 & 2:** Hover over the **Home** tab, then select the **Universal Profile** tab. You will be taken to the User Record page.



**Step 3:** Click the **Edit Record** button at the bottom left side of the screen to edit your User Record.

To help FAI accurately report training data, it is important that the data you enter on this page is correct.  
Click the **Edit** button at the bottom of this page to edit fields.

<b>Name:</b> FAI Employee	<b>User Name:</b> FAI_Employee
<b>User ID:</b> FAI_Employee	
<b>Original Hire Date:</b>	
<b>Active Status:</b> Active	

**Edit Record**

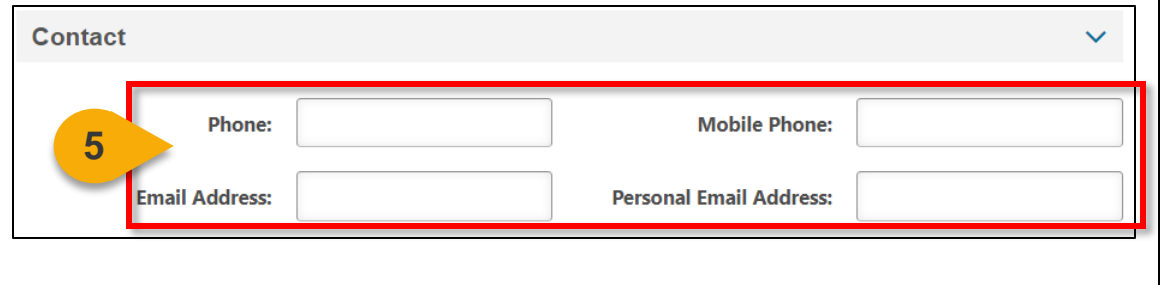
**Step 4:** In the first section at the top of the screen, you can edit your **First Name**, **Middle Name**, **Last Name**, and **User Name**.

**Edit User Record**

<b>First Name: *</b>	FAI
<b>Middle Name:</b>	
<b>Last Name: *</b>	Employee
<b>User Name: *</b>	FAI_Employee

# Edit User Record (Cont.1)

**Step 5:** In the Contact section, you can fill in your **Phone, Mobile Phone, Email Address, and Personal Email Address.**



Contact

5

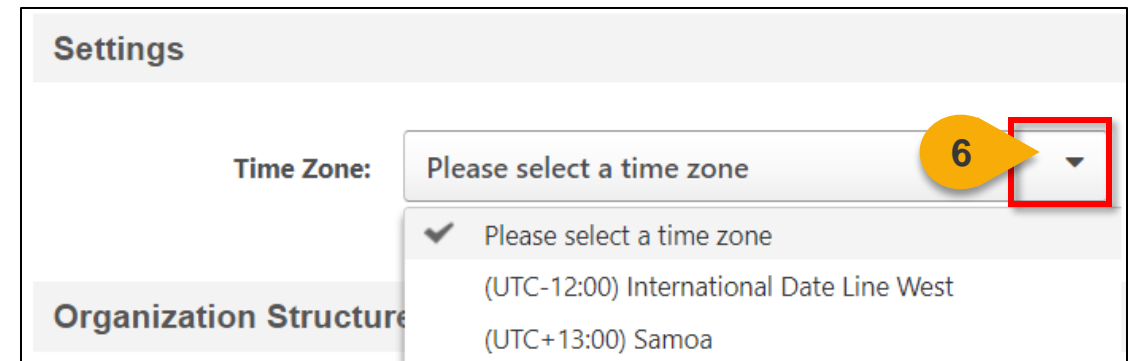
Phone:

Mobile Phone:

Email Address:

Personal Email Address:

**Step 6:** In the Time Zone section, you can click the dropdown to select the appropriate time zone for your location.



Settings

Time Zone: Please select a time zone

6

✓ Please select a time zone

(UTC-12:00) International Date Line West

(UTC+13:00) Samoa

Organization Structure

**Step 7:** In the Organization Structure section, you can input your **Manager, Dean or Director, Position, Location.**



Organization Structure

7

Manager:

Dean or Director:

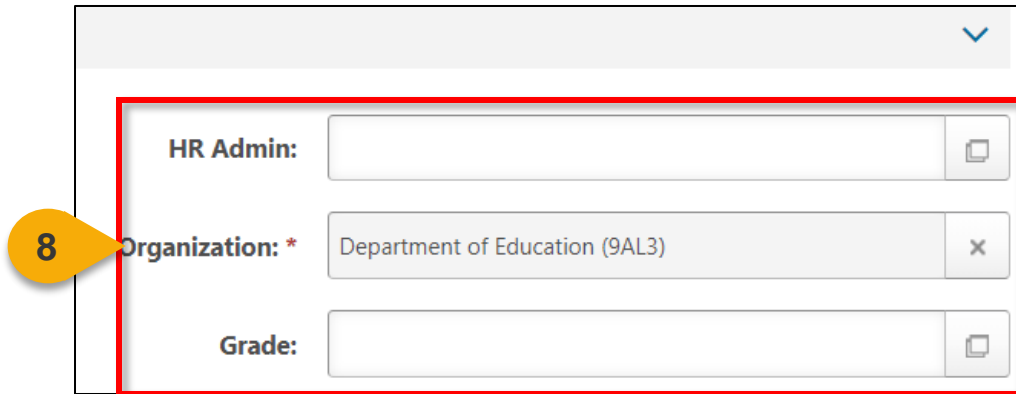
Position:

Location:



# Edit User Record (Cont.2)

**Step 8:** In the Organization Structure, you can also edit the **HR Admin, Organization, and Grade.**

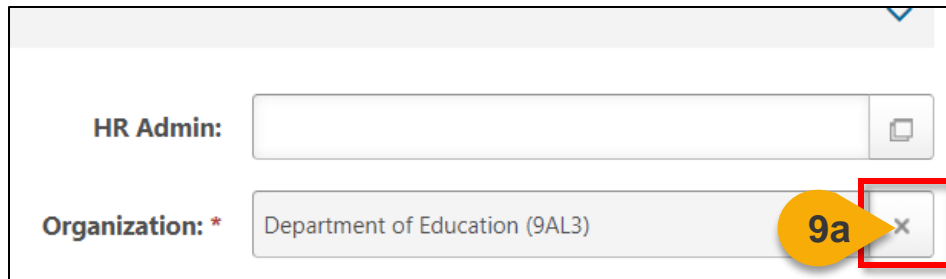


HR Admin:

**8** Organization: \* Department of Education (9AL3)

Grade:

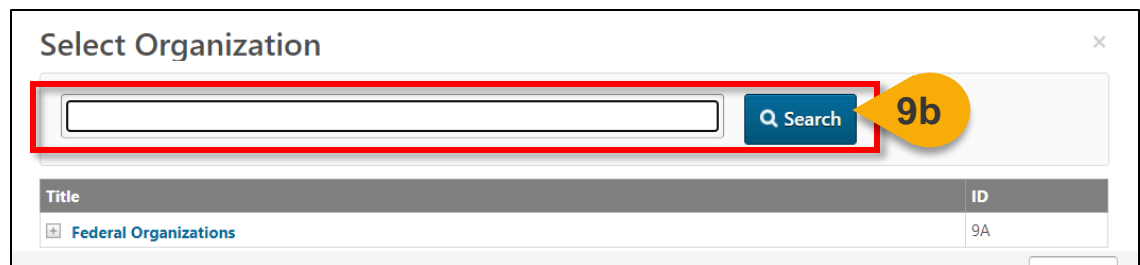
**Step 9a:** To search for your organization, Click on the **box** next to Organization. A popout box will appear.



HR Admin:

Organization: \* Department of Education (9AL3)

**Step 9b:** You can manually enter the name of your organization in the **search box.**



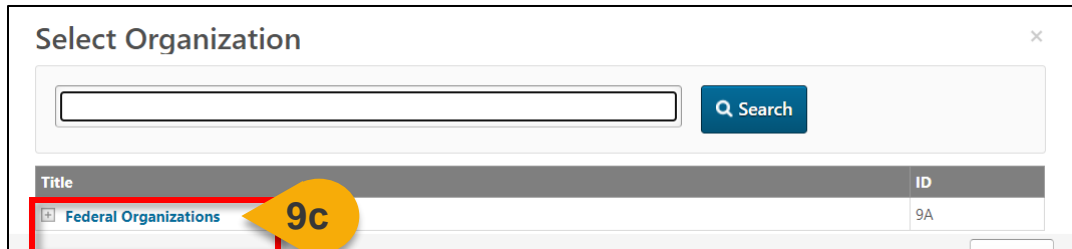
Select Organization

**9b**

Title	ID
<input type="checkbox"/> Federal Organizations	9A

# Edit User Record (Cont.3)

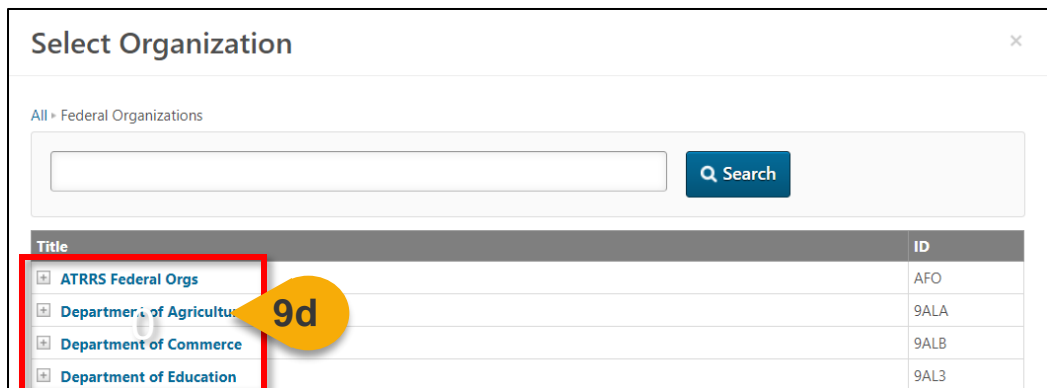
**Step 9c:** You can also click **Federal Organizations** to drill down to see more organizations and search manually.



Select Organization

Title	ID
<input type="checkbox"/> Federal Organizations	9A

**Step 9d:** Click on the name of your **organization** to add it to your User Record.



Select Organization

All » Federal Organizations

Title	ID
<input type="checkbox"/> ATRRS Federal Orgs	AFO
<input type="checkbox"/> Department of Agriculture	9ALA
<input type="checkbox"/> Department of Commerce	9ALB
<input type="checkbox"/> Department of Education	9AL3

**Step 10:** In the Other Demographics section, you have the option to fill in additional information on your demographics such as **Work City, Zip Code, Disability, etc.**



Other Demographics

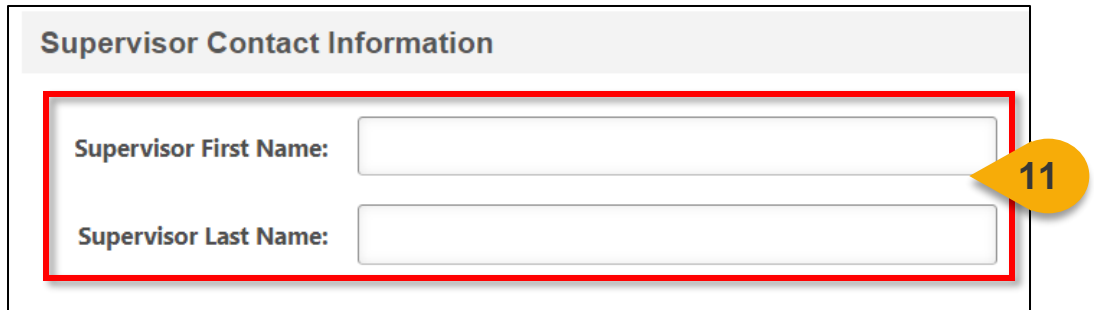
Work City:

Work Zip Code:

Disability: ☐

# Edit User Record (Cont.4)

**Step 11:** In the Supervisor Contact Information section, you can fill in the **first and last name** of your supervisor.



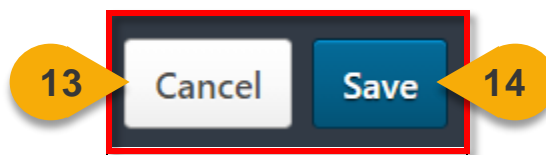
The image shows a form titled "Supervisor Contact Information". Inside the form, there are two input fields. The first field is labeled "Supervisor First Name:" and the second field is labeled "Supervisor Last Name:". A red rectangular box highlights both input fields. A yellow callout bubble with the number "11" points to the "Supervisor First Name:" field.

**Step 12:** In the Supervisor Contact Information section, you can also enter your **Supervisor's Phone and Email**.



The image shows the same "Supervisor Contact Information" form. Below the name fields, there are two more input fields. The first field is labeled "Supervisor Phone:" and the second field is labeled "Supervisor Email:". A red rectangular box highlights both input fields. A yellow callout bubble with the number "12" points to the "Supervisor Phone:" field.

**Steps 13 & 14:** Click **Save** to keep all the changes or click **Cancel** to discard the changes.

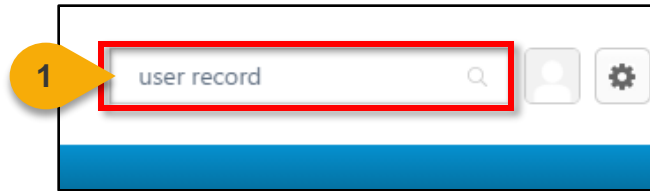


The image shows two buttons: "Cancel" and "Save". The "Cancel" button is white with a black border, and the "Save" button is blue with a white border. A red rectangular box highlights both buttons. A yellow callout bubble with the number "13" points to the "Cancel" button, and another yellow callout bubble with the number "14" points to the "Save" button.

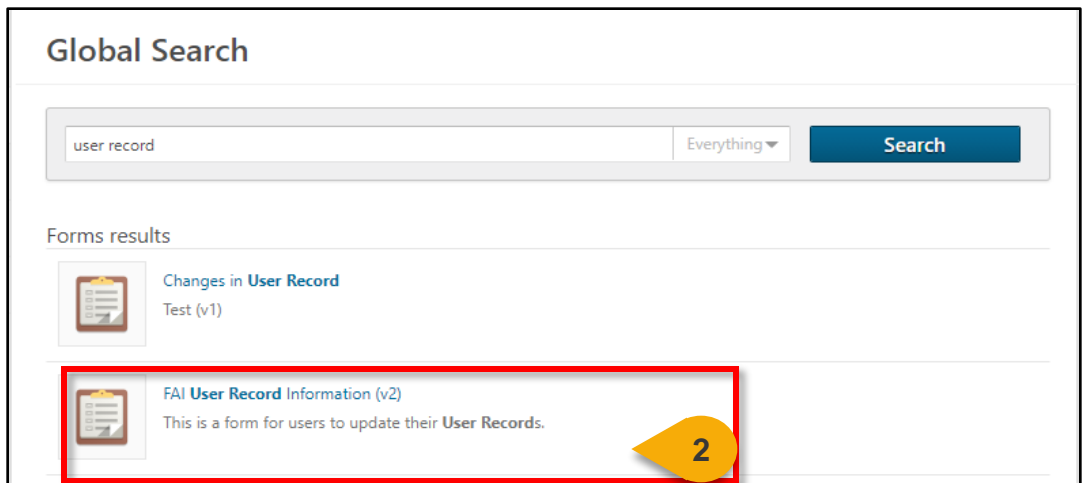
# Edit User Record via Advanced Forms

*When you want to edit the User Record using Advanced Forms...*

**Step 1:** In the **Global Search** box, type “User Record” and click the magnifying glass.



**Step 2:** Select the **FAI User Record Information** form.



# Edit User Record via Advanced Forms (Cont.1)

**Steps 3 & 4:** Fill in the form and click **Submit** at the bottom of the page when finished. Fields with a \* are required. You will see the changes reflected on your User Record immediately.

## FAI User Record Information (v2)

This is a form for users to update their User Records.

All fields marked with an asterisk are required.

3

First Name \*

Middle Name

Last Name \*

Suffix

Local System ID

Cancel

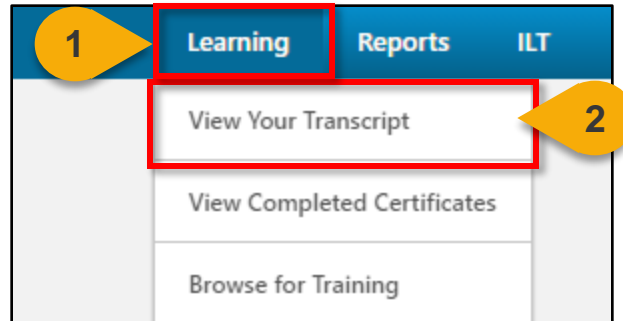
4

Submit

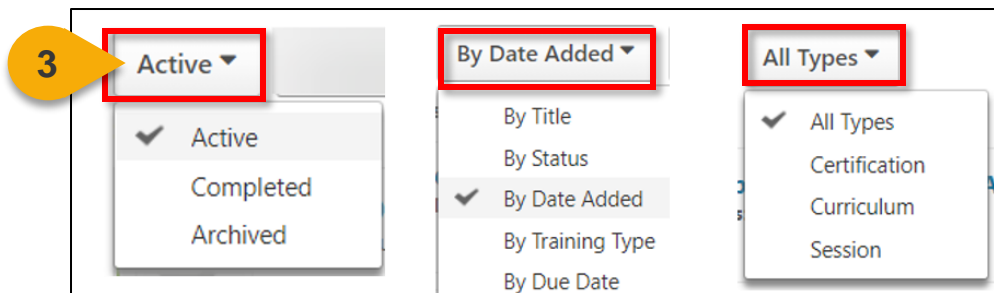
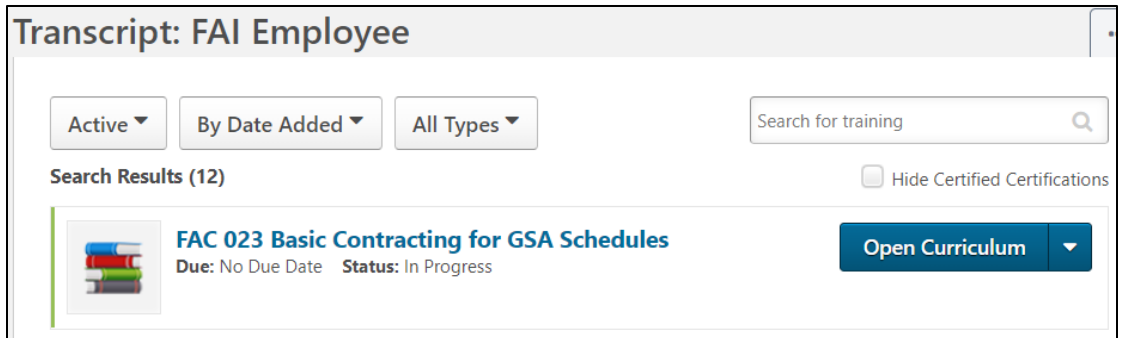
# View Transcript

*When you want to view your Transcript...*

**Steps 1 & 2:** Hover over the **Learning** tab and then select **View Your Transcript**.



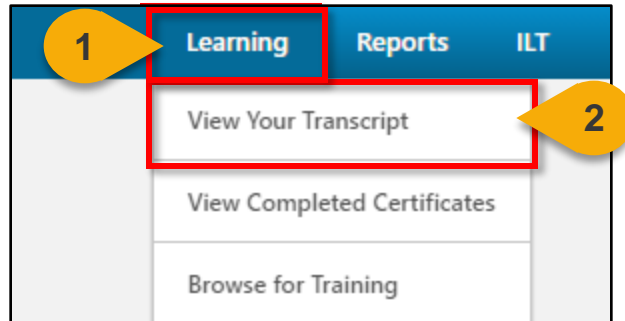
**Step 3:** You will be taken to your Transcript. You can click the **dropdown arrow** filter to show Active, Completed, and Archived courses. By default, only active courses you have not completed will be listed. Click on the **arrows** by each filter for dropdowns to sort the courses.



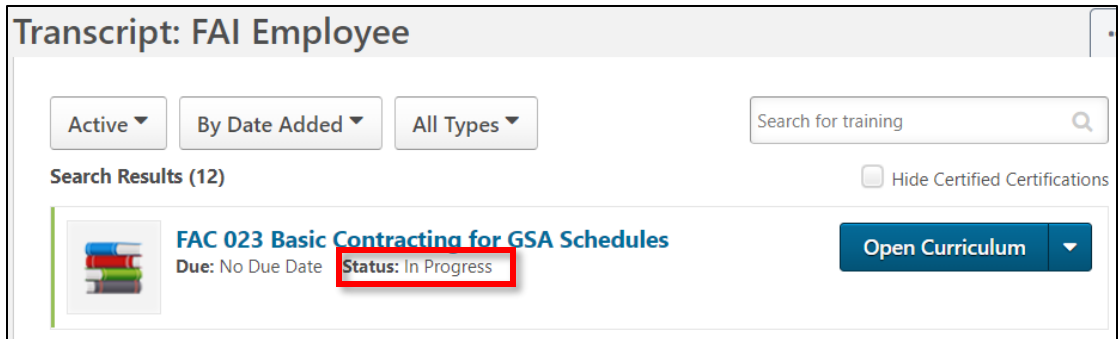
# View Transcript Status

*When you want to view your Transcript status...*

**Steps 1 & 2:** Hover over the **Learning** tab and then select **View Your Transcript**.



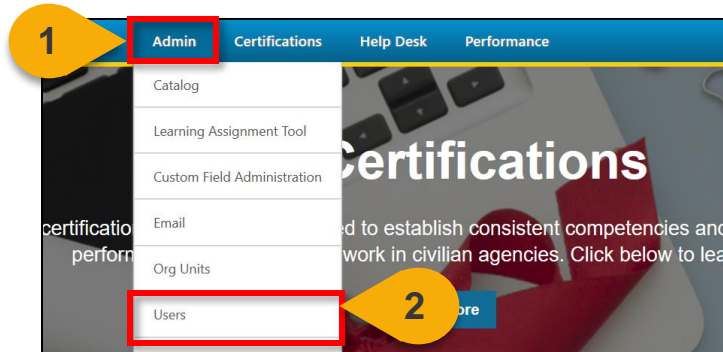
Your Transcript will display in the screen. The **status** of your courses will be listed underneath the title of the course.



# Search for a User

*When you want to look up a User...*

**Steps 1 & 2:** Hover over the **Admin** tab and then select **Users**.



**Step 3:** Enter User information into the **search fields**.

A screenshot of the 'Users' search form. The form contains several input fields: 'Last Name', 'First Name', 'User ID', 'User Name', 'Email', 'City', 'State', 'Zip', 'Country' (a dropdown), 'Manager', 'Approver', and 'Active' (a dropdown). A red box highlights the 'Last Name', 'First Name', 'User ID', 'User Name', 'Email', 'City', 'State', 'Zip', and 'Country' fields. A yellow callout bubble with the number '3' points to the 'Approver' field. At the bottom of the form is a 'Select OU Criteria' dropdown.

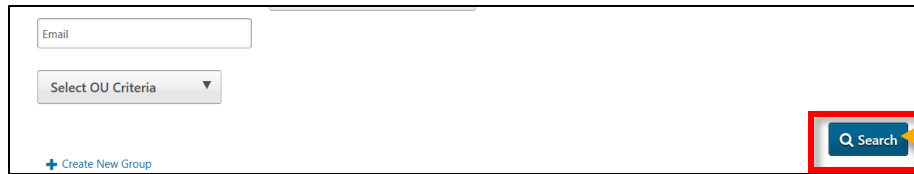
**Step 4:** Click on **Select OU Criteria** to further filter your search if desired.

A screenshot of the 'Users' search form, identical to the one in Step 3. A yellow callout bubble with the number '4' points to the 'Select OU Criteria' dropdown at the bottom of the form, which is also highlighted with a red box.



# Search for a User (Cont.1)

**Step 5: Hit enter or click Search.**



Email

Select OU Criteria ▼

+ Create New Group

Search

**The search results will populate. From here you can view the User Record or Transcript for the User. See the “View User’s Record” and “View User’s Transcript” task aids for more information on how perform these functions.**

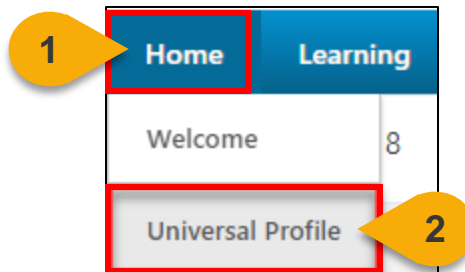
Search Results							
User	User Name	User ID	Status	Identifier	Manager	Approver	Options
JOHN, JOHN	JOHN, JOHN	JOHN, JOHN	Active	Department of Transportation Organization			▼
JOHN, JOHN	JOHN, JOHN	JOHN, JOHN	Active	Department of Defense Organization			▼
JOHN, JOHN	JOHN, JOHN	JOHN, JOHN	Active	Department of Health & Human Services Organization			▼
JOHN, JOHN	JOHN, JOHN	JOHN, JOHN	Active	Department of Justice Organization			▼

(4 Results)

# View User's Record

*When you want to view your subordinate's user record...*

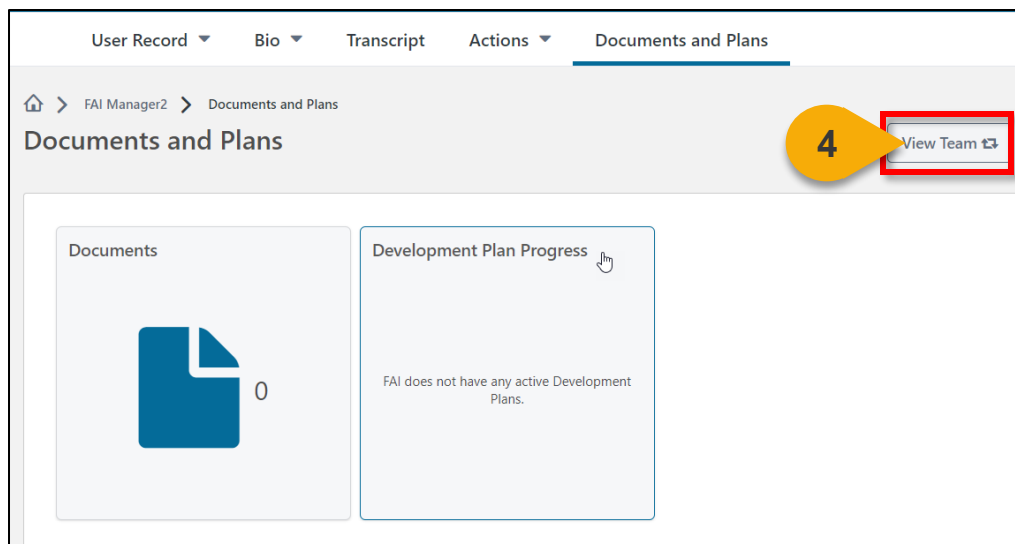
**Steps 1 & 2:** Hover over **Home**, then select **Universal Profile**.



**Step 3:** Click on **Documents and Plans**.

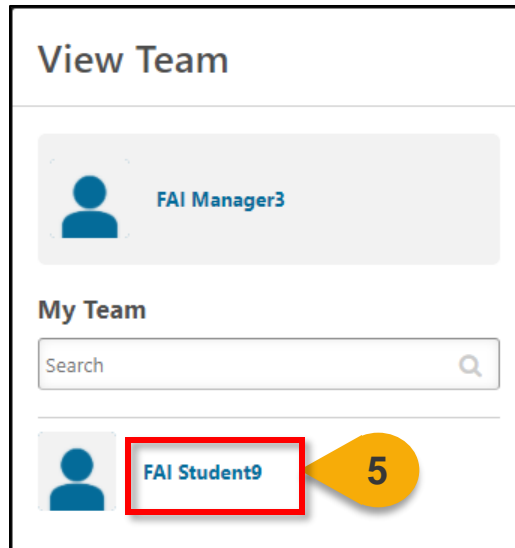


**Step 4:** Click on **View Team**.

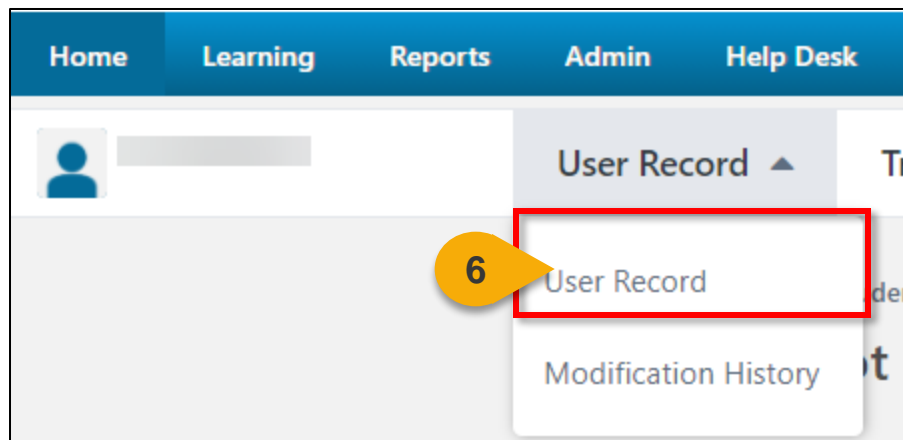


# View User's Record (Cont.1)

**Step 5:** Select the **name** of the user whose record you'd like to view.



**Step 6:** You will now see your subordinate's account. Click on **User Record**.

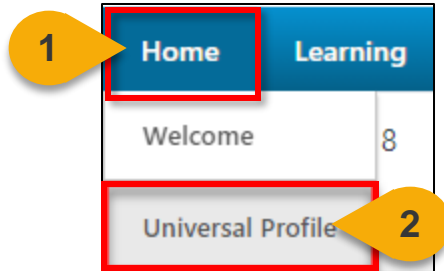


**Note:** Using the breadcrumbs on the page will take you back to YOUR User Record, not your subordinates.

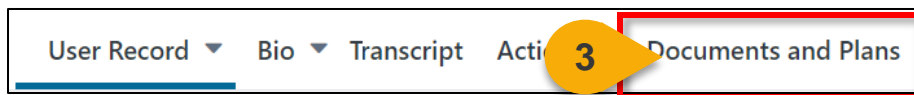
# View User's Transcript

*When you want to view your subordinate's transcript...*

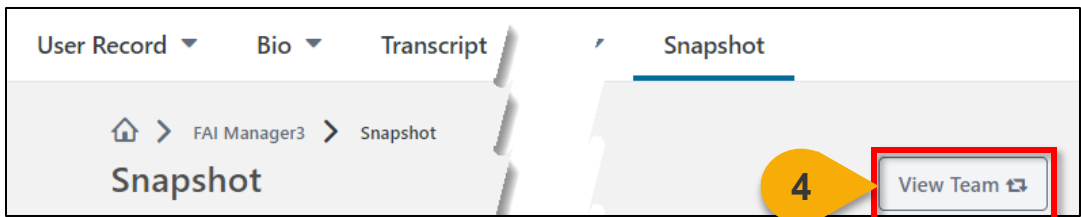
**Steps 1 & 2:** Hover over **Home**, then select **Universal Profile**.



**Step 3:** Click on **Documents and Plans**.



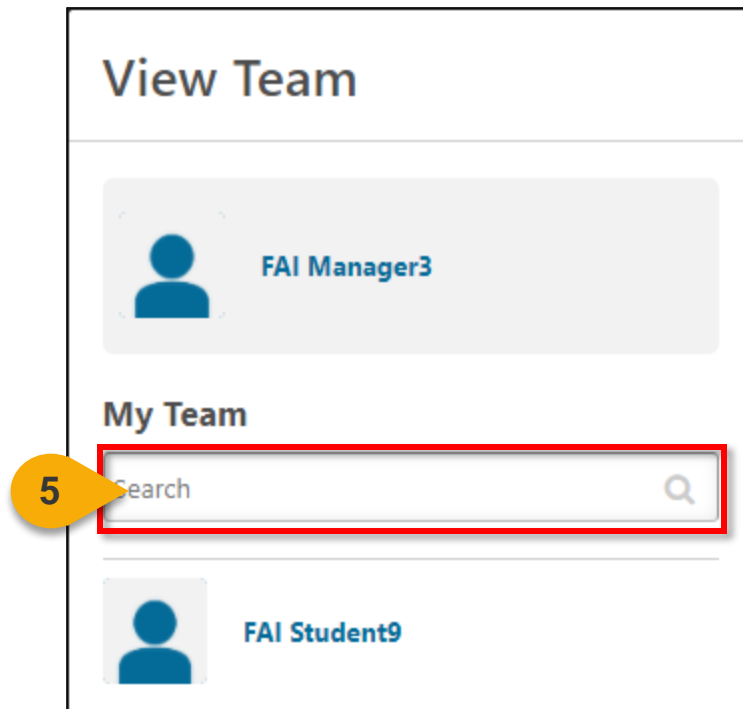
**Step 4:** Click on **View Team**.



# View User's Transcript (Cont.1)

**Step 5:** A popup window will show your direct reports. Search for specific reports using the **Search bar**.

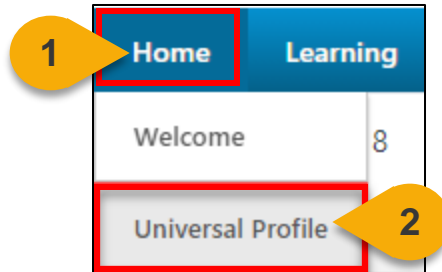
**Step 6:** After selecting the Employee whose transcript you'd like to view, you will be taken to their transcript.



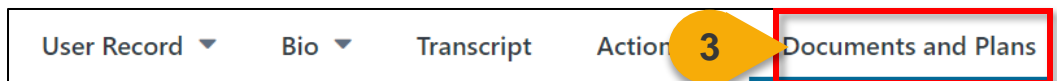
# View Your Team

*When you want to view all the members of your team...*

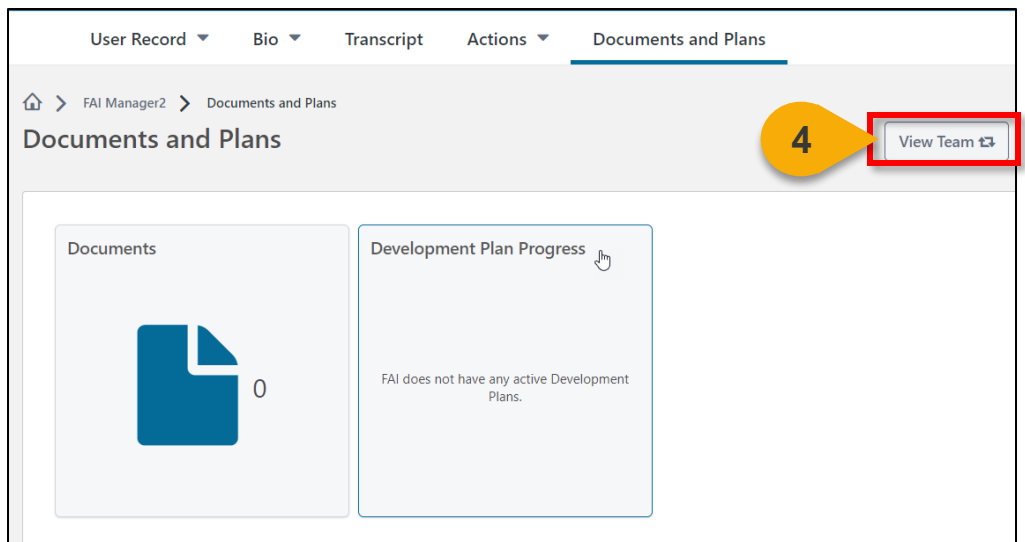
**Steps 1, 2: Hover over Home > select Universal Profile.**



**Step 3: Click on Documents and Plans.**

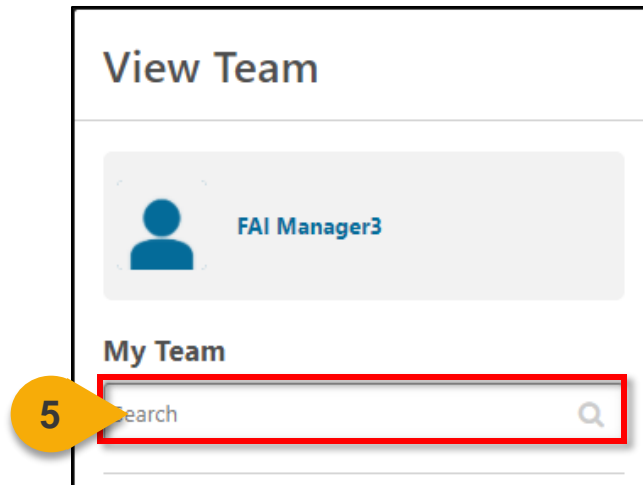


**Step 4: Click on View Team.**



# View Your Team (Cont.1)

**Step 5: A popup window will show your direct reports. Search for specific employees by using the Search bar.**



# Use Global Search

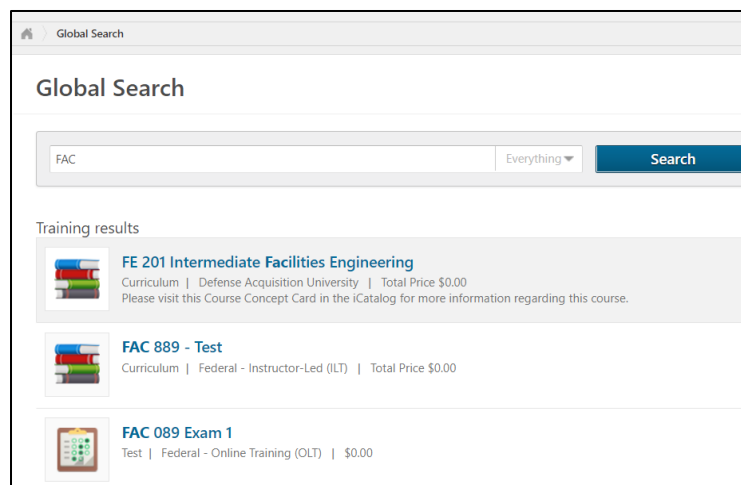
*When you want to search for Training, Certifications, or Forms...*

**Global Search:** This predictive search bar, found at the top right of the home page, helps users search for training, certification and forms.

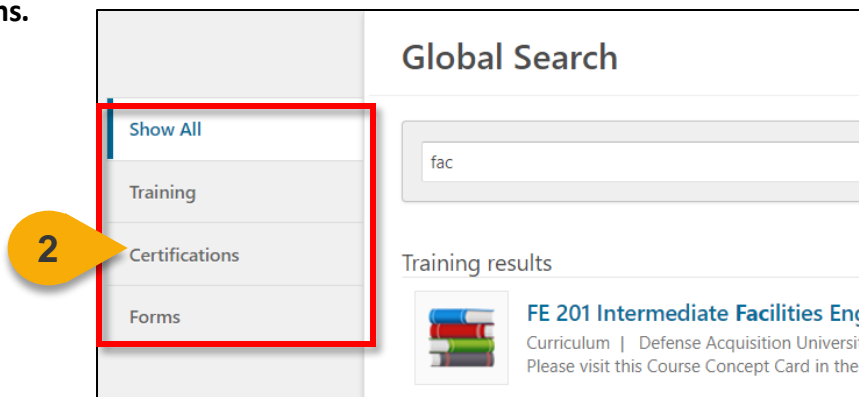
**Step 1:** Enter your desired Search Terms and click the **Magnifying Glass** or hit enter to search.



The page will refresh, and your results will be listed on the page.



**Step 2:** To the left of the search bar, you can choose to filter by **Training, Certifications, or Forms.**





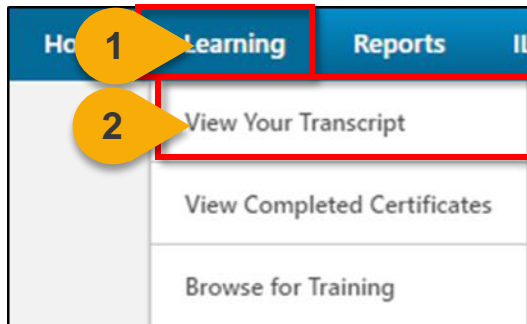
# External Training



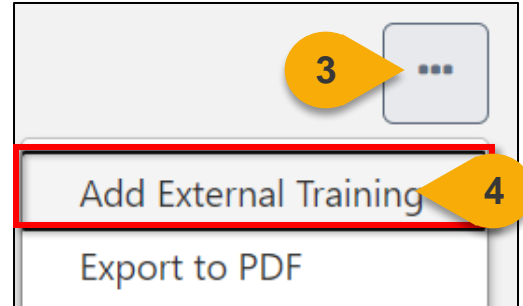
# Request External Training Credit from Transcript

*When you want to add an external training to your Transcript...*

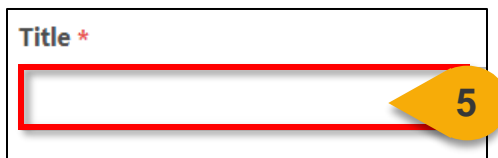
**Steps 1 & 2:** Hover over the **Learning** tab and click **View Your Transcript**.



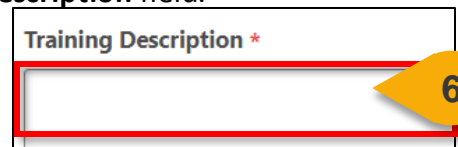
**Steps 3 & 4:** Click on the **ellipsis button** at the top left-hand corner. Then click on **Add External Training**.



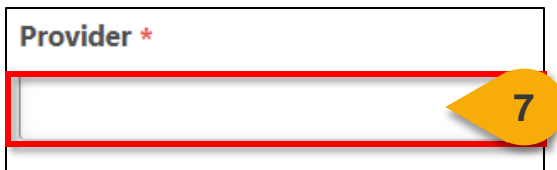
**Step 5:** Enter the title of your external training in the **Title** field.

A screenshot of a form field labeled 'Title \*'. The field is empty and has a red border. A yellow callout bubble with the number 5 points to the field.

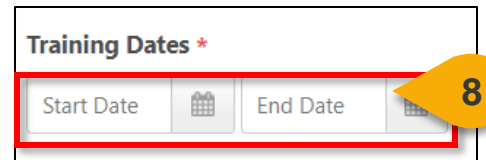
**Step 6:** Enter a description of the external training in the **Training Description** field.

A screenshot of a form field labeled 'Training Description \*'. The field is empty and has a red border. A yellow callout bubble with the number 6 points to the field.

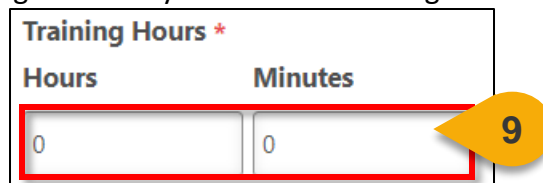
**Step 7:** Enter the name of the provider of the external training in the **Provider** field.

A screenshot of a form field labeled 'Provider \*'. The field is empty and has a red border. A yellow callout bubble with the number 7 points to the field.

**Step 8:** Enter the start and end dates of your external training in the **Start Date** and **End Date** fields.

A screenshot of form fields for 'Training Dates \*'. It includes 'Start Date' and 'End Date' fields, each with a calendar icon. The fields are highlighted with a red border. A yellow callout bubble with the number 8 points to the fields.

**Step 9:** Enter the training hours for your external training in the respective **Hours** and **Minutes** fields.

A screenshot of form fields for 'Training Hours \*'. It includes 'Hours' and 'Minutes' fields. Both fields contain the number '0' and are highlighted with a red border. A yellow callout bubble with the number 9 points to the fields.

# Request External Training Credit from Transcript (Cont.1)

---

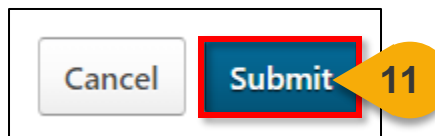
**Step 10:** Click **Select File** to add proof of your successful completion of your External Training.



Attachment(s) \*

10 Select a file

**Step 11:** Click **Submit** to submit the form for approval.

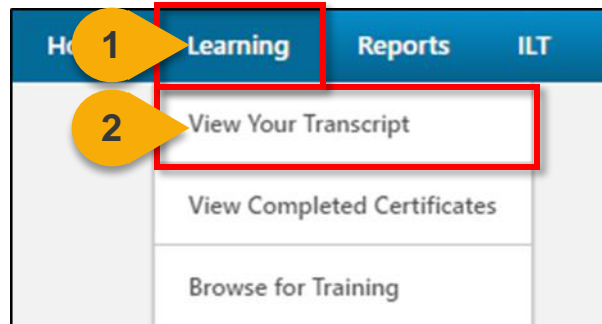


Cancel Submit 11

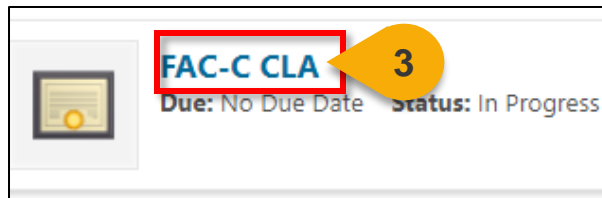
# Request External Training Credit Within a Certification

*When you want to request external credit from within the certification...*

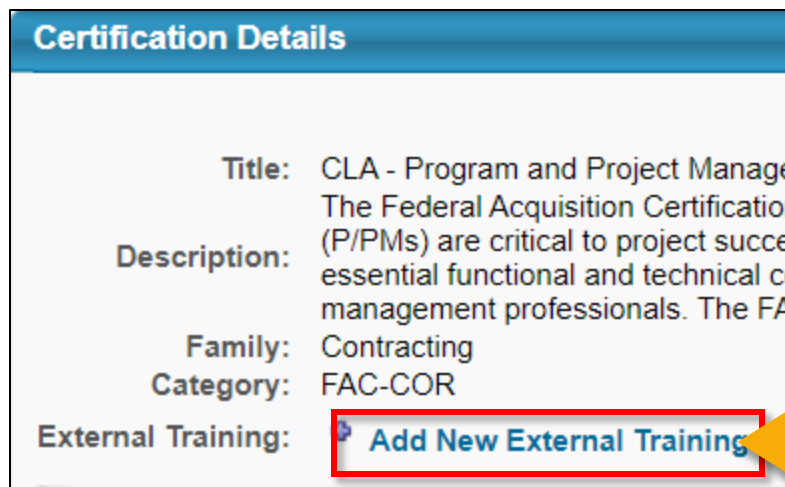
**Steps 1 & 2:** Hover over the **Learning** tab and click **View Your Transcript**.



**Step 3:** Click on the **title** of the certification where you want to add an external training.

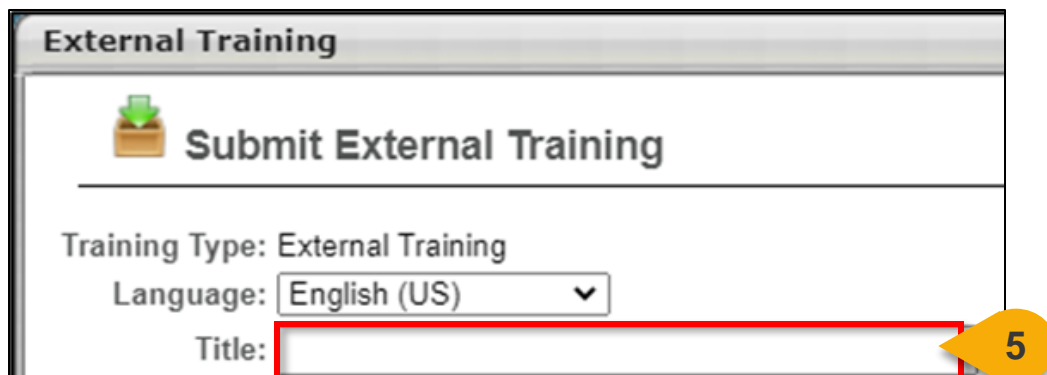


**Step 4:** Click on **Add New External Training**.

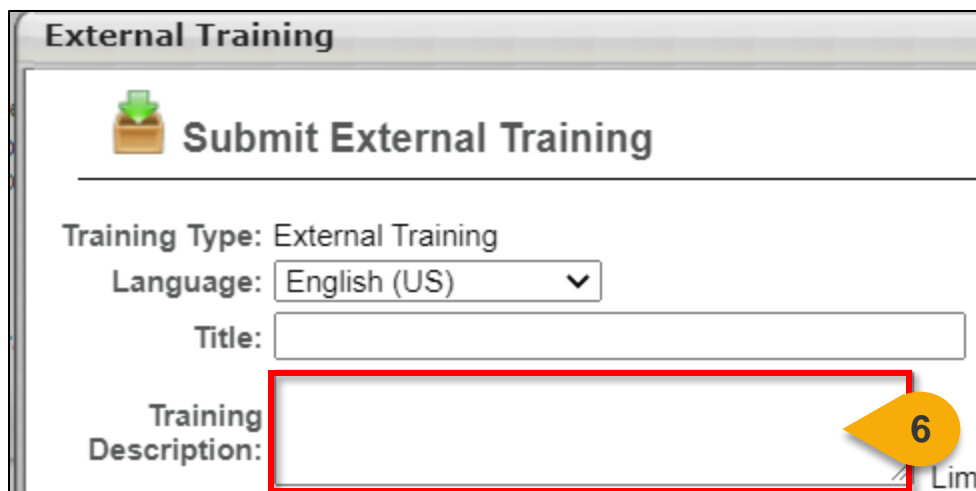


# Request External Training Credit Within a Certification (Cont.1)

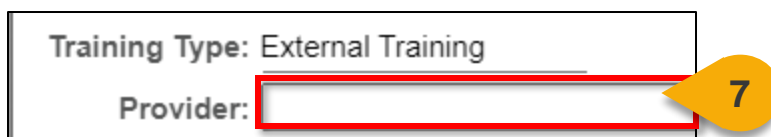
**Step 5:** A popup will appear. Enter the title in the **Title** field.



**Step 6:** Enter a description of the external training into the **Training Description** field.



**Step 7:** Enter the name of the institution into the **Institution** field.



# Request External Training Credit Within a Certification (Cont.2)

**Step 8:** Enter the dates of your external training in the **Training Dates** field.

Training Dates: From  To

**Step 9:** Enter the number of hours and minutes of the external training into the **Training Hours** text fields.

Training Hours:  Hours  Minutes

**Step 10:** Click the **dropdown button** next to the External Training category field

External Training Category:

**Step 11:** Select the applicable **type of training** from the External Training Category dropdown.

External Training Category:

- Select
- Select
- Training/Education
- Professional Organization/Events
- Publishing Articles
- Participation in Experiential Activities
- Other

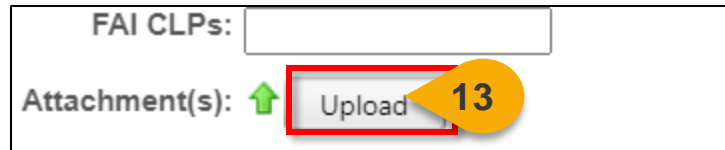
**Step 12:** Enter the number of CLPs into the **FAI CLPs** field.

FAI CLPs:


Attachment(s):

# Request External Training Credit Within a Certification (Cont.3)

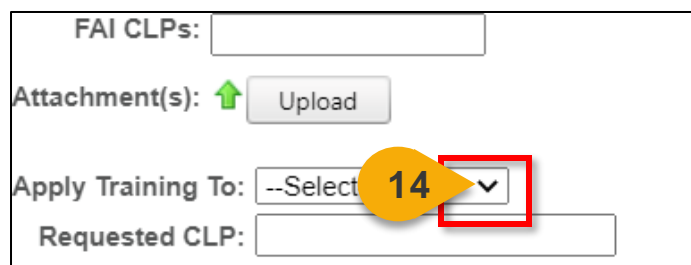
**Step 13:** Click **Upload** to add any supporting documents to the Attachments section if necessary.




FAI CLPs:


Attachment(s):  **Upload**

**Step 14::** Click the **dropdown button** next to the Apply Training To field.



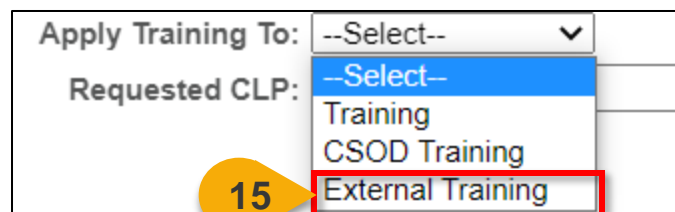
FAI CLPs:


Attachment(s): 

Apply Training To: --Select-- 

Requested CLP:

**Step 15:** Select **External Training** from the dropdown.



Apply Training To: --Select-- 

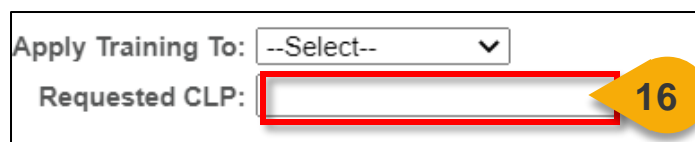
Requested CLP: --Select--


Training

CSOD Training

**External Training**

**Step 16:** Enter the **number of CLPs** earned in the Requested CLP field.




Apply Training To: --Select-- 


Requested CLP:

# Request External Training Credit Within a Certification (Cont.4)

**Step 17:** Click **Ok** when you you've finished entering the information on your external training. This will submit the form to an External Training Approver.

FAI CLPs:

Attachment(s): 

Apply Training To:  

Requested CLP:

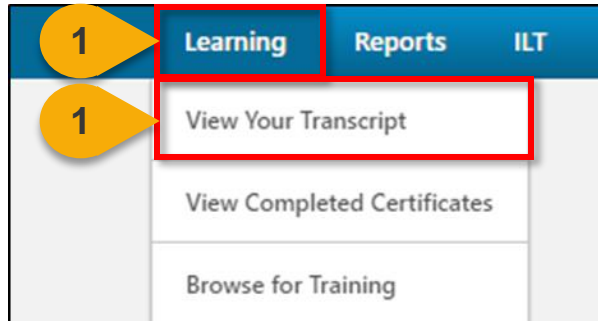
**17**



# Add External Training to a Certification

*When you want to submit external training from your transcript to fulfill a certification requirement...*

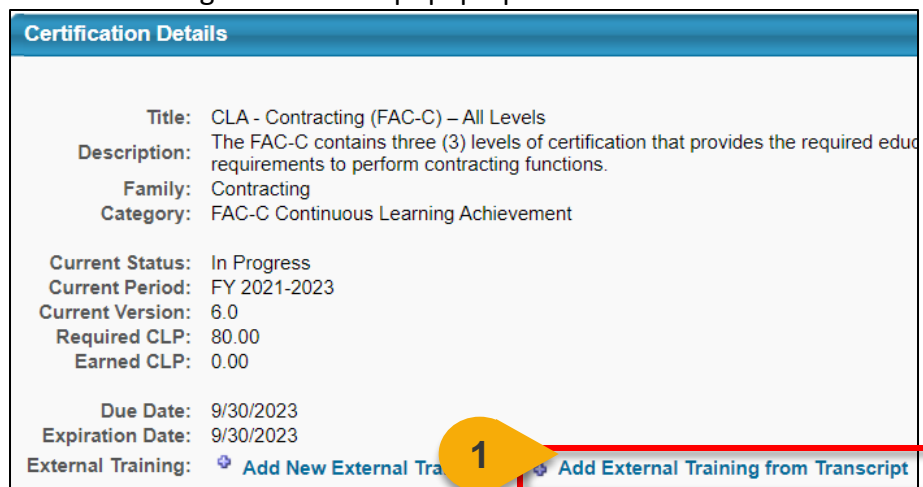
**Steps 1 & 2:** Hover over the **Learning** tab and then click **View Your Transcript**.



**Step 3:** Click on the **title** of the Certificate to which you'd like to add your external training.



**Step 4:** Click the **Add External Training from Transcript** link. This opens the Submit External Training from Transcript pop-up.



# Add External Training to a Certification (Cont.1)

**Step 5:** Click the **dropdown** next to Select a Section to choose the section of the .certificate that the training will be applied to

External Training

Submit External Training From Transcript

Select a Section : External Training ▼

--Select--  
Training  
CSOD Training  
External Training

Enter the number of credits earned for this item. If the credits are present, you may edit the amount before submitting for approval.

**Step 6:** Mark the **checkbox** next to the training item that you'd like to submit external training for.

External Training

Submit External Training From Transcript

Select a Section : CSOD Training ▼

Enter the number of credits earned for this item. If the credits are present, you may edit the amount before submitting for approval.

Select	Title	Status	CLP
<input checked="" type="checkbox"/>	Test	Complete	8.00

**Step 7:** In the **CLP** field to the right of the training item, enter the number of credits that were earned from the External Training.

External Training

Submit External Training From Transcript

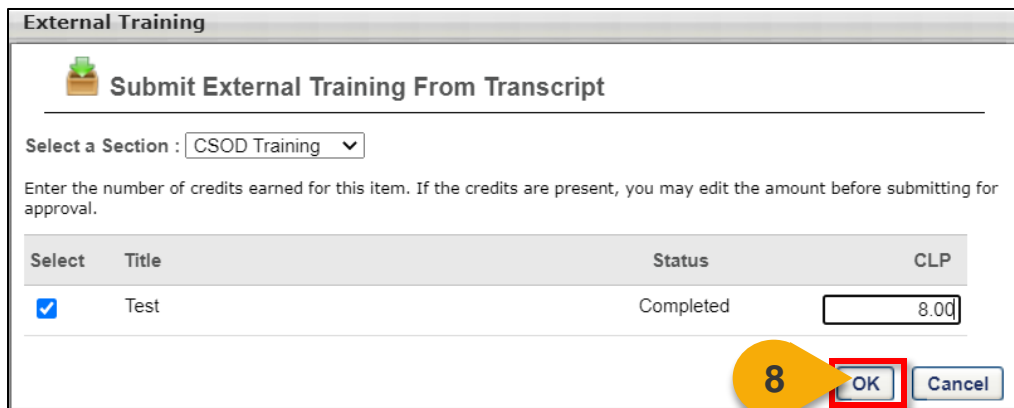
Select a Section : CSOD Training ▼

Enter the number of credits earned for this item. If the credits are present, you may edit the amount before submitting for approval.


Select	Title	Status	CLP
<input checked="" type="checkbox"/>	Test	Complete	8.00

# Add External Training to a Certification (Cont.2)

**Step 8:** Click **OK** to submit the training for approval. If multiple training items are selected, each item is submitted as a separate request to the certification owner, even though they are submitted at the same time.



**External Training**

 **Submit External Training From Transcript**

Select a Section : CSOD Training

Enter the number of credits earned for this item. If the credits are present, you may edit the amount before submitting for approval.

Select	Title	Status	CLP
<input checked="" type="checkbox"/>	Test	Completed	<input type="text" value="8.00"/>

**8** **OK** **Cancel**

Your External Training will be submitted for approval. The status of the training will be marked as **Completed(Evidence Needed)** until approved.

CERTIFICATION		
TITLE	CLP	STATUS
Training (Required CLP: Min = 80.00, Max = 80.00 / A		
CSOD Training (Required CLP: Min = 0.00, Max = 8		
Test	8.00	Completed (Evidence Needed)
CLM 090 Sustainable Military Facilities	8.00	Completed
CLM 092 Master Planning Energy and Sustain	8.00	Not Activated

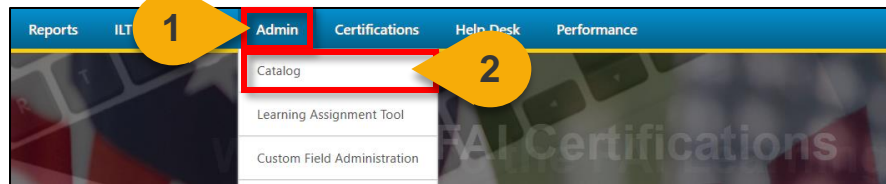
# Online Training



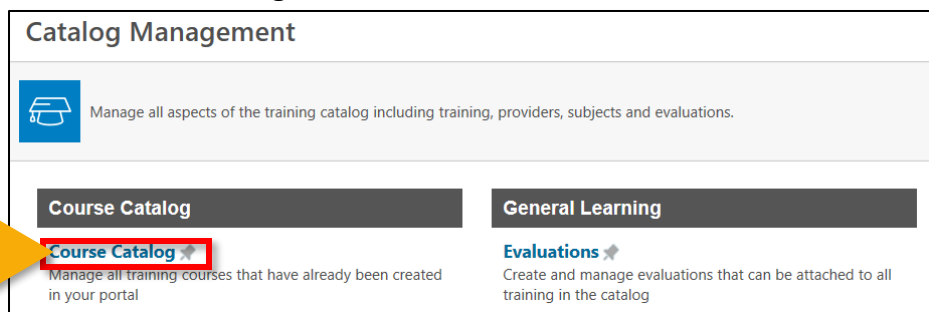
# View Online Trainings in Catalog

*When you want to view online training...*

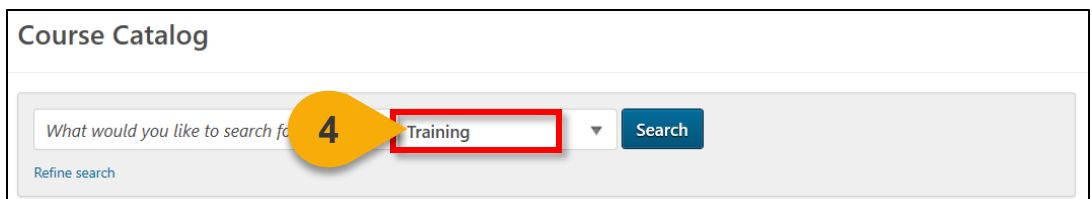
**Steps 1 & 2:** Go to **Admin**, then select **Catalog**.



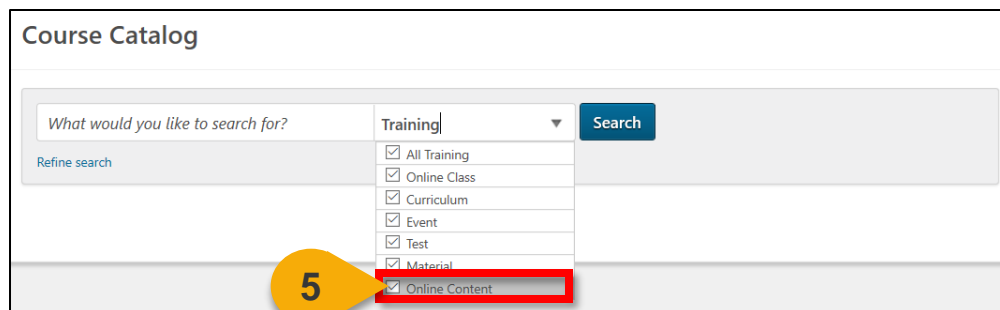
**Step 3:** Click on **Course Catalog**.



**Step 4:** After you enter the name of the course you are searching for click on the **Training dropdown** next to the search box.

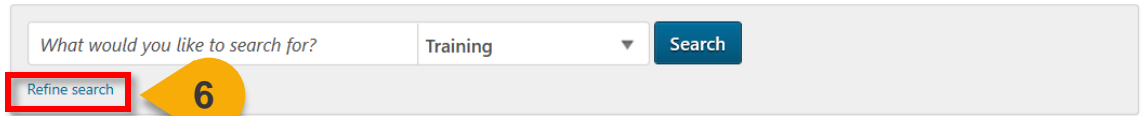


**Step 5:** Check the **Online Content** box.



# View OLT in Catalog (Cont.1)

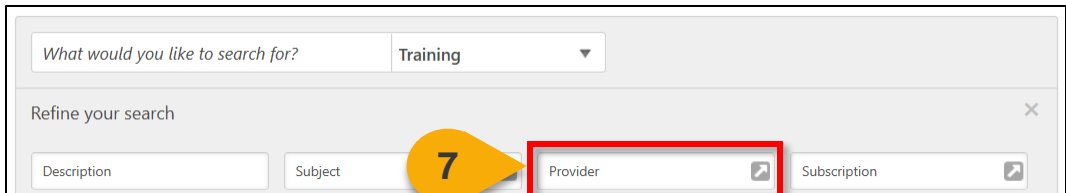
**Step 6:** Click on **Refine Search**.



What would you like to search for? Training Search

Refine search

**Step 7:** Click **Provider** to filter by Provider. You can follow the instructions below for filtering by Provider for any of the Refine your search fields.

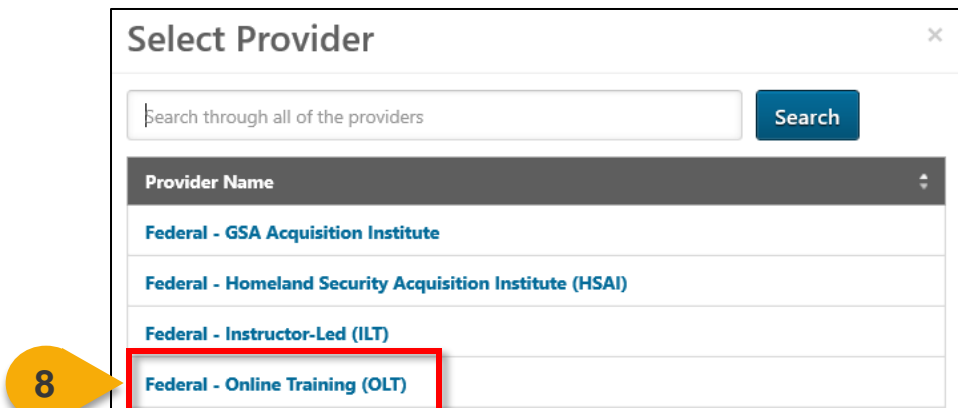


What would you like to search for? Training

Refine your search

Description Subject Provider Subscription

**Step 8:** Select the **Provider** you wish to filter your search results by.



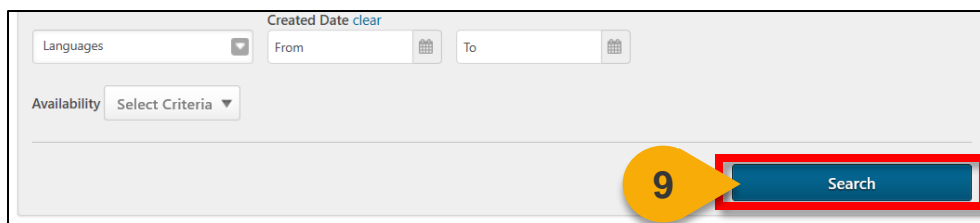
Select Provider

Search through all of the providers Search

Provider Name

- Federal - GSA Acquisition Institute
- Federal - Homeland Security Acquisition Institute (HSAI)
- Federal - Instructor-Led (ILT)
- Federal - Online Training (OLT)

**Step 9:** Click **Search**. All relevant OLT will appear in the search results.



Languages Created Date clear From To

Availability Select Criteria

Search

# Register for Online Training (OLT)

*When you want to register for Online Training...*

**Step 1:** Type the name of the OLT you would like to take into the Global Search box and click the **magnifying glass** or hit enter.




Search


**Step 2:** Your search results will appear on the next page. Click the **title** of the OLT you would like to take.

**Global Search**

Training results



**FAC 068 Contract Types**  
Curriculum | Federal - Online Training (OLT) | Total Price \$0.00  
Develop an understanding of the most common contract types and their basic characteristics as well as factors to consider when selecting and negotiating the contract type.



**FAC 057 COR Refresher**  
Curriculum | Federal - Online Training (OLT) | Total Price \$0.00  
This module provides a refresher of the duties, roles and responsibilities of the Contracting Officer's Representative (COR) in the contract pre-award phase, and the contract administration and management phase. Module 1 provides an overview of these elements, while Module 2 is an interactive, scenario-based exercise that allows the COR to apply im...

**Step 3:** Click the **Open Curriculum** button to register for the OLT. The course will then be added to your Transcript with a status of Registered.

**CURRICULUM**

**FAC 057 COR Refresher**

Last Updated 11/19/2020

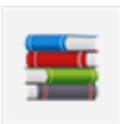
**Details**

This module provides a refresher of the duties, roles and responsibilities of the Contracting Officer's Representative (COR) in the contract pre-award phase

**CURRICULUM**

FAC 057 COR Refresher

**Open Curriculum** ▼



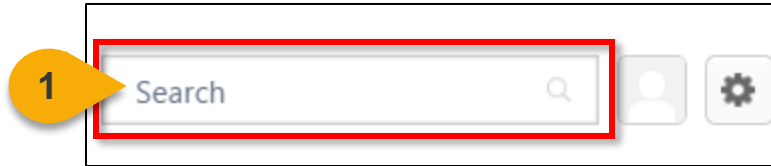
**FAC 057 COR Refresher**  
Due: No Due Date **Status: Registered**

**Open Curriculum** ▼

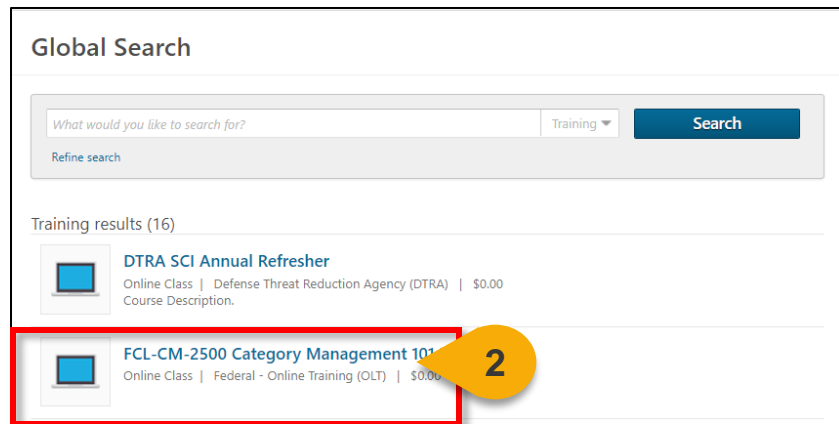
# Assign Online Training (OLTs)

*When you want to assign an online training to your subordinates...*

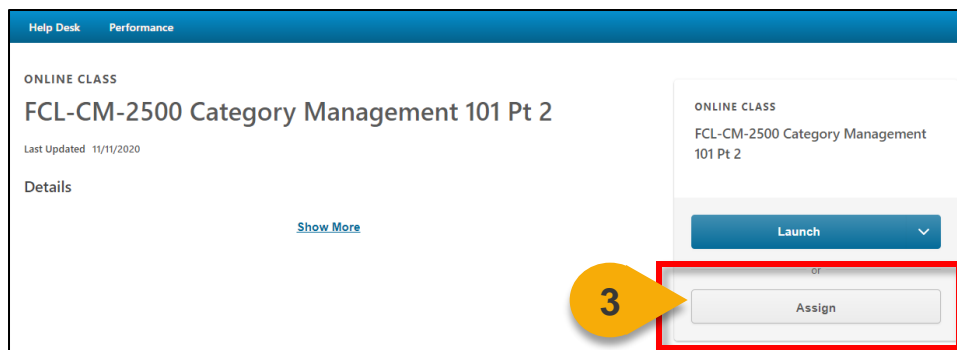
**Step 1:** Search for the **online training** that you would like to assign using Global Search.



**Step 2:** Select the **training** you wish to assign.



**Step 3:** Click **Assign**.





# Assign OLTs (Cont. 1)

**Step 4:** Select a **Due Date** (if applicable) by clicking on the Calendar icon.

**Step 5:** Enter any comments in the **Comment box**.

**Step 6:** You can decide to automatically register subordinates into the ILT by click the **checkbox** next to “Automatically Registers Users” (recommended).

The screenshot shows a form titled "FCL-CM-2500 Category Management 101 Pt 2" with the subtitle "Online Class • Federal - Online Training (OLT) • \$0.00". Below the title is a "Due Date" field with a calendar icon, highlighted by a red box and a yellow callout with the number 4. Below that is a large text area labeled "Add a Comment", highlighted by a red box and a yellow callout with the number 5. At the bottom is a checkbox labeled "Automatically register users", highlighted by a red box and a yellow callout with the number 6.

**Step 7:** Select the subordinates you want to assign the training to by marking the **checkbox** next to the name of the subordinate. You may assign to your direct and indirect subordinates.

The screenshot shows a table with the header "Users who have the training already in their transcript are not included in this assignment". The table has four columns: "Direct Subordinates", "Language Equivalency", "Assignment History", and an unnamed column for the selection checkbox. The first row is highlighted with a red box and a yellow callout with the number 7. The first row contains a checkbox, a user icon, the name "FAI Student9", and the value "0".


Users who have the training already in their transcript are not included in this assignment			
<input type="checkbox"/>	Direct Subordinates	Language Equivalency	Assignment History
<input type="checkbox"/>	FAI Student9		0


# Assign OLTs (Cont. 2)

**Step 8:** Click the **Submit** button at the bottom of the page.

☐ Automatically register users

**Users who have the training already in their transcript are not**

<input type="checkbox"/>	Direct Subordinates	Language E
<input checked="" type="checkbox"/>	 FAI Student3	

Select an Indirect Subordinate  Select a User from

Indirect Subordinates	Language Equival

Current Status	Include Subordinates
None	

History	Current Status

**8** **Submit**

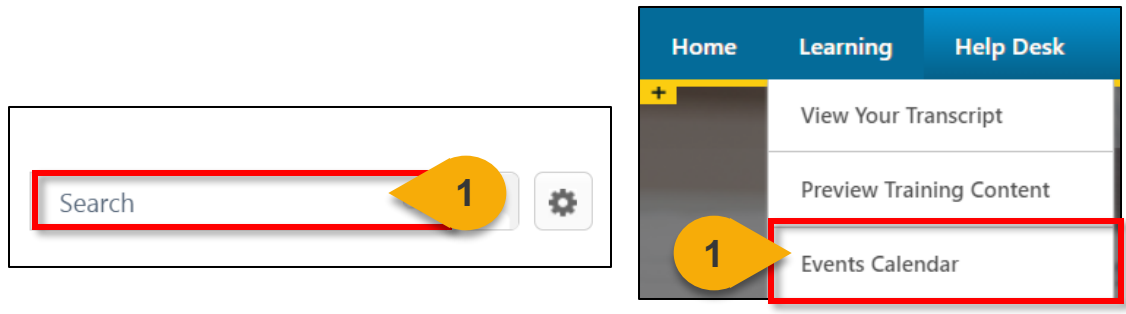
# **Instructor -Led Training**



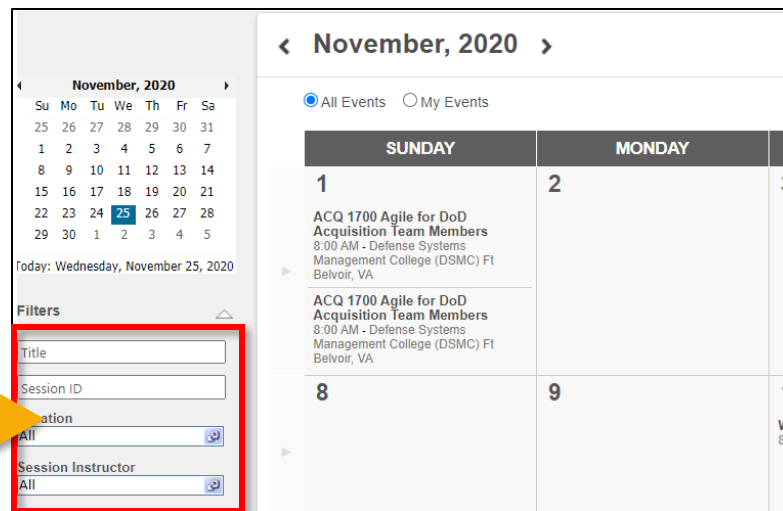
# Register for Instructor-Led Training (ILT)

*When you want to register for an Instructor Led Training...*

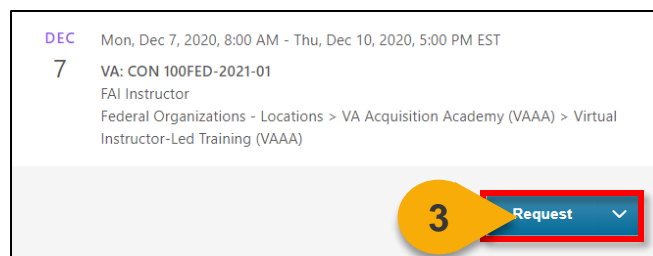
**Step 1:** Use **Global Search** or **Events Calendar** to find the instructor-led training course you'd like to take.



**Step 2:** On the Events Calendar, you can search by **Title, Session ID, Subject, or Instructor**.



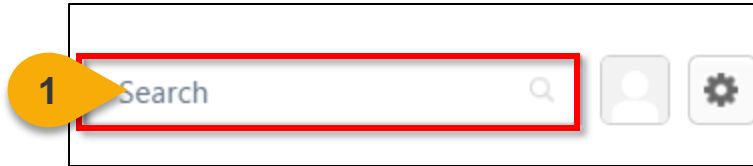
**Step 3:** The Event will be displayed on the screen. You will see any available Sessions. Next to the desired Session, click on **Request**.



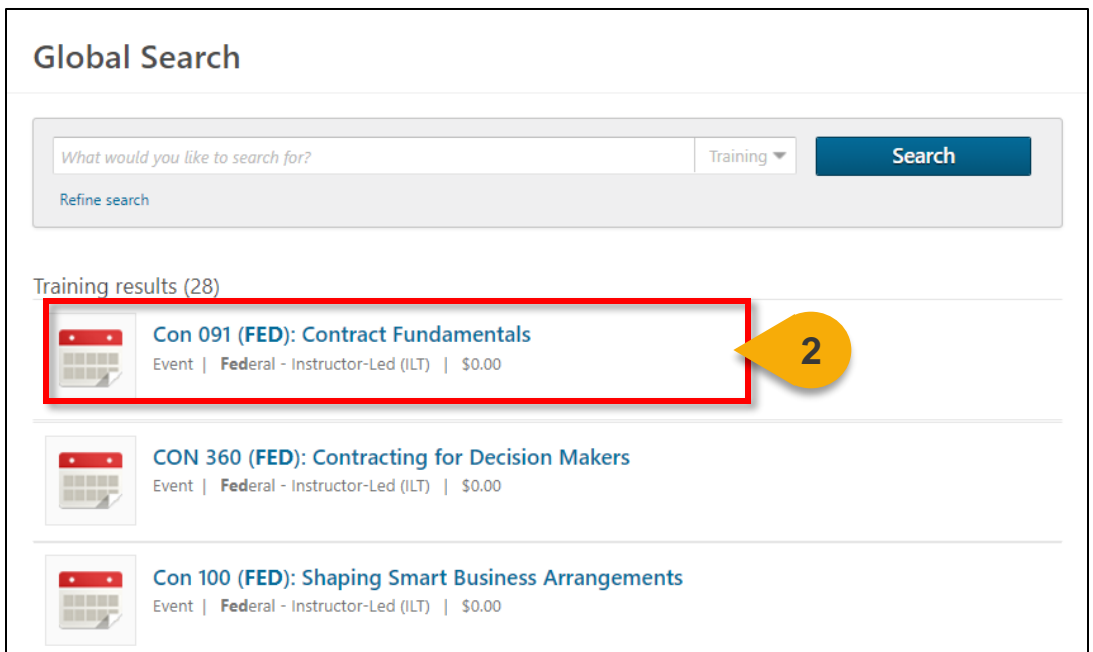
# Assign Instructor-Led Training (ILTs)

*When you want to assign an instructor led training course to your subordinates...*

**Step 1:** Search for the event that you would like to find using Global Search.



**Step 2:** Select the **Event** you want to assign to users.



# Assign ILTs (Cont. 1)

**Step 3:** Click **Assign** in the panel on the right to assign the Event but allow the assignee to choose their own Session.

Reports Admin Help Desk Performance

EVENT

## Con 100 (FED): Shaping Smart Business Arrangements

Last Updated 11/17/2020

Details

[Show More](#)

Upcoming Sessions

Date (Ascending) ▾

2 Sessions

EVENT

Con 100 (FED): Shaping Smart Business Arrangements

Select a Session ▾


or

**3** Assign


**Step 4:** Enter a **Due Date** for the training, if applicable.

Back Assign Training

## Assign Training

 **Con 100 (FED): Shaping Smart Business Arrangements**  
Event • Federal - Instructor-Led (ILT) • \$0.00

Select Session

**4** Due Date 

# Assign ILTs (Cont. 2)

**Step 5:** Enter any comments in the **Comment box**.

**Step 6:** You can decide to automatically register subordinates into the ILT (by passing approval workflows) by clicking the checkbox next to “Automatically Registers Users” (recommended).

The screenshot shows the ILT assignment interface for the event "Con 100 (FED): Shaping Smart Business Arrangements". It includes a "Select Session" button, a "Due Date" field, a "Comment box" (highlighted with a red border and a yellow callout bubble with the number 5), and a checkbox labeled "Automatically register users" (highlighted with a red border and a yellow callout bubble with the number 6).

**Step 7:** Select the **subordinates** you want to assign the training to. You may assign to your direct and indirect subordinates.


The screenshot shows the subordinate selection interface. A blue banner at the top states: "Users who have the training already in their transcript are not included in". Below this is a table with columns for selection, subordinate name, and language equivalency. The first row shows a selection checkbox (highlighted with a red border and a yellow callout bubble with the number 7) and the name "FAI Student9".

	Direct Subordinates	Language Equivalency
<input type="checkbox"/>	FAI Student9	

# Assign ILTs (Cont. 3)

**Step 8:** Click the **Submit** button at the bottom of the page.

**Users who have the training already in their transcript are not included in this assignment**

<input type="checkbox"/>	Direct Subordinates	Language Equivalency	Assignment History	Current Status	Include Subordinates
<input type="checkbox"/>	 FAI Student9		0	None	

Select an Indirect Subordinate

Select a User from a Cost Center | Appr...

Indirect Subordinates	Language Equivalency	Assignment History	Current Status
-----------------------	----------------------	--------------------	----------------

**8** **Submit**



# Indicate Interest in a Future Session

*When interested in a course once new Sessions become available...*

**Steps 1 & 2 :** Using Global Search, search for the Event you'd like register for. Click on the **Event Title**.

The screenshot shows the 'Global Search' interface. A red box highlights the search bar with the placeholder text 'What would you like to search for?' and a 'Search' button. A yellow callout '1' points to the search bar. Below the search bar, the text 'Training results (132)' is displayed. A red box highlights the first result, 'CMC 200 Fees, Financing, and Payments', which includes a small icon, the event title, and details: 'Event | Defense Acquisition University | \$0.00'. A yellow callout '2' points to the event title. Below the title, there is a brief description and a link to apply for the course.

**Step 3:** On the on the Event page, click either the **Notify Me** or **Notify Me of New Sessions** button.

The screenshot shows a blue button with the text 'Notify Me' and a dropdown arrow. A yellow callout '3' points to the button.

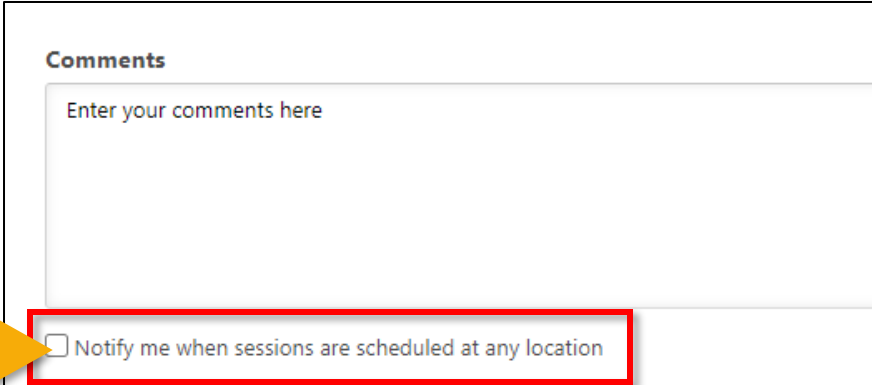
The screenshot shows the 'EVENT' page. A dropdown menu is open, showing options: 'Select a Session', 'Save for Later', and 'Notify Me of New Sessions'. A red box highlights the 'Notify Me of New Sessions' option. A yellow callout '3' points to this option.

**Step 4:** You have the option to select to be notified of Sessions held in a specific location. Enter the **Location** field to do this.

The screenshot shows the 'Interest Tracking' form. A red box highlights the 'Location' field, which has a placeholder text 'Select a Location'. A yellow callout '4' points to the field.

# Indicate Interest in a Future Session (Cont. 1)

**Step 5:** Enter any comments and to be notified for all sessions in any location, check the **box** next to “Notify me when sessions are schedule at any location”.



The screenshot shows a registration form with a 'Comments' section. The 'Comments' section has a text area with the placeholder text 'Enter your comments here'. Below the text area, there is a checkbox labeled 'Notify me when sessions are scheduled at any location'. A yellow callout bubble with the number '5' points to the checkbox. A red rectangular box highlights the checkbox and its label.

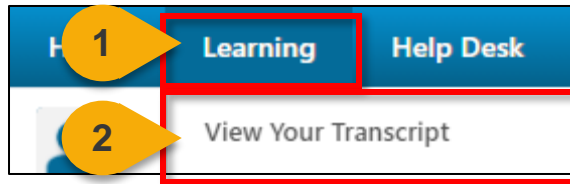
**Step 6:** Once you have completed selecting the location preferences, click the **Submit** button at the bottom of the page.



# Withdraw from an ILT

*When you need to withdraw from an ILT course...*

**Steps 1 & 2:** Hover over the **Learning** tab and select **View Your Transcript**.



**Step 3:** Search and find the course you wish to withdraw. Select **Withdraw**.



**Step 4 & 5:** Select a **reason** for withdrawal and then click **Submit**.

The 'Withdraw Registration' form contains the following sections:

- Session Details:**
  - Event Name: Con 100 (FED): Shaping Smart Business Arrangements
  - Date / Time: (1) 12/7/2020 8:00 AM - 12/10/2020 5:00 PM
  - Location: Virtual Instructor-Led Training (VAAA)
  - Price: \$0.00
- SESSION WITHDRAWAL OPTIONS:**
  - A dropdown menu with the text 'Please select a reason' is open, showing a list of reasons: 'Please select a reason', 'Other', 'Illness/Family Emergency', 'Inclement Weather', 'Leave', 'No Longer Needed', 'Reschedule Due to Conflict', 'TDY', 'Technology Issue', and 'Workload'. A yellow callout bubble with the number '4' points to this dropdown.
  - Below the dropdown is a text input field.
  - At the bottom of the form are two buttons: 'Submit' and 'Cancel'. A yellow callout bubble with the number '5' points to the 'Submit' button.

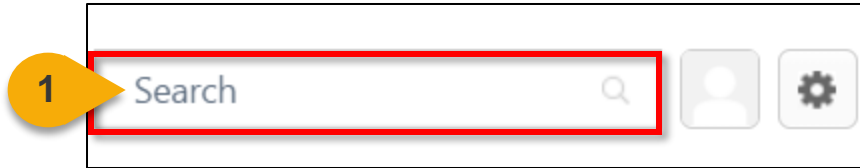
# Certifications



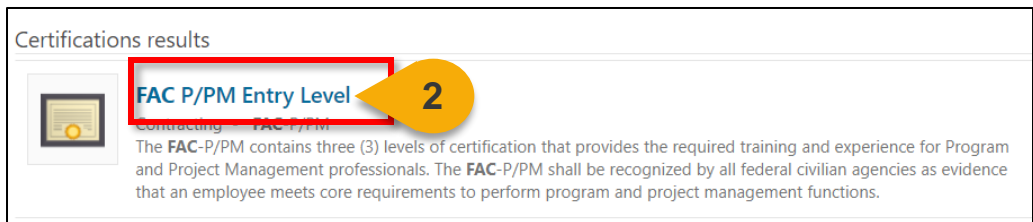
# Request and Manage a Certification

*When you want to request a Certification...*

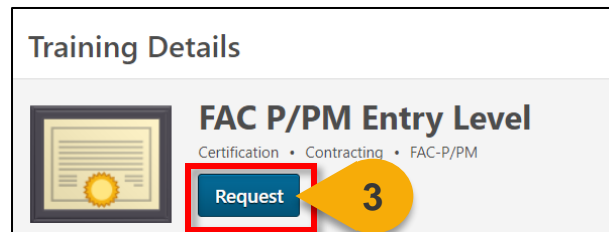
**Step 1:** In Global Search, type in the Certification you wish to request and click the Magnifying Glass.



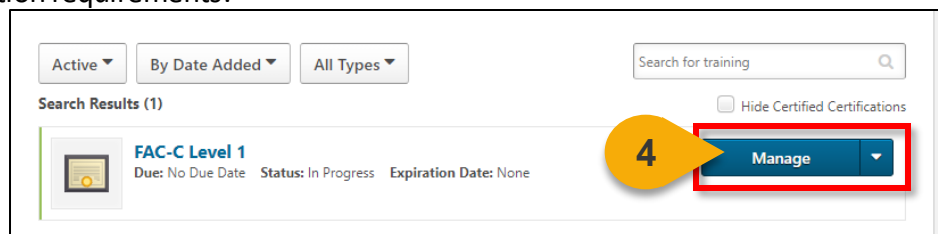
**Step 2:** Click on the **Certification** you'd like in the results.



**Step 3:** Click the **Request** button for the Certification of your choice.

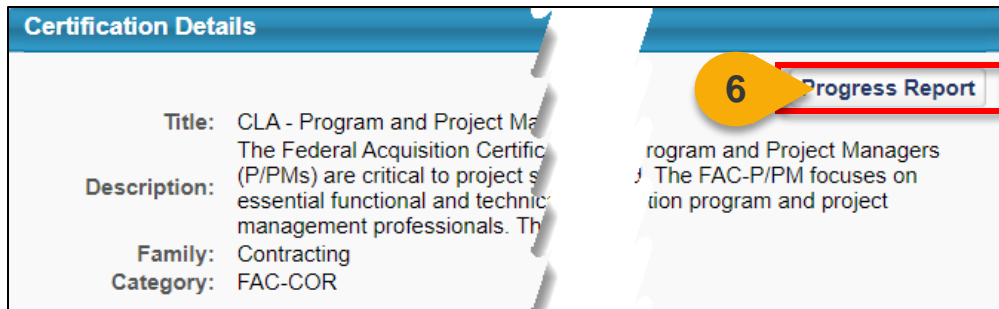


**Step 4:** You will be directed to your Transcript page. The Certification will be listed on the screen under Active courses with "In Progress" status. Click **Manage** to view the Certification requirements.



# Request and Manage a Certification (Cont.1)

**Step 6:** From the Certification Details page, you can see what training needs to be completed to satisfy the certification requirements by clicking **Progress Report**.



**Certification Details**

**Title:** CLA - Program and Project Management  
The Federal Acquisition Certification (P/PMs) are critical to project success. The FAC-P/PM focuses on essential functional and technical management professionals. The program and Project Managers

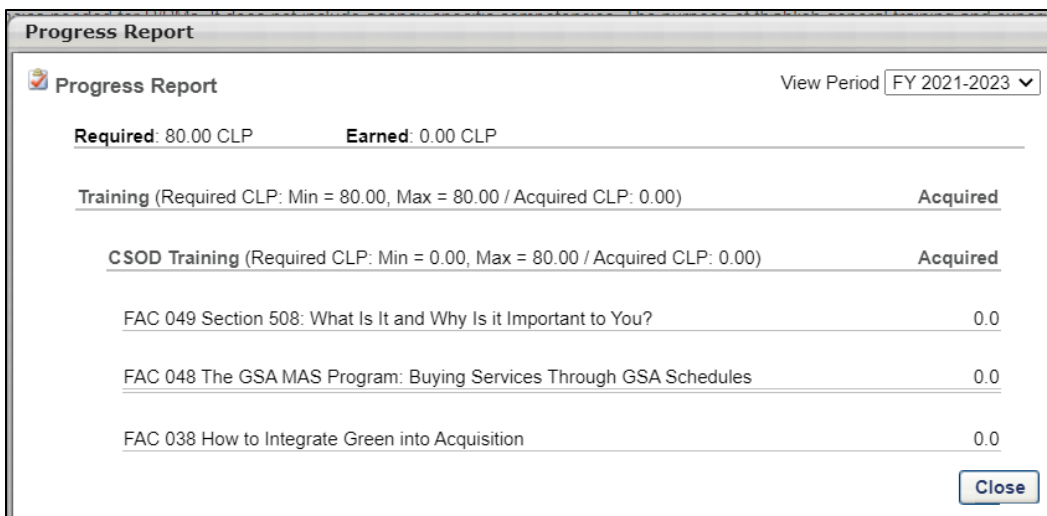
**Description:** The FAC-P/PM focuses on essential functional and technical management professionals. The program and Project Managers

**Family:** Contracting

**Category:** FAC-COR

**6** **Progress Report**

A popup window will appear that displays the required CLPs, the CLPs earned so far, and list of trainings needed to complete the certification.



**Progress Report**

View Period: FY 2021-2023

**Required:** 80.00 CLP **Earned:** 0.00 CLP

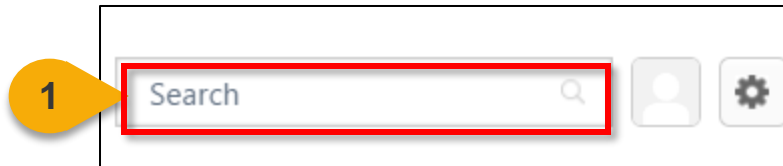
Training (Required CLP: Min = 80.00, Max = 80.00 / Acquired CLP: 0.00)	Acquired
CSOD Training (Required CLP: Min = 0.00, Max = 80.00 / Acquired CLP: 0.00)	Acquired
FAC 049 Section 508: What Is It and Why Is it Important to You?	0.0
FAC 048 The GSA MAS Program: Buying Services Through GSA Schedules	0.0
FAC 038 How to Integrate Green into Acquisition	0.0

**Close**

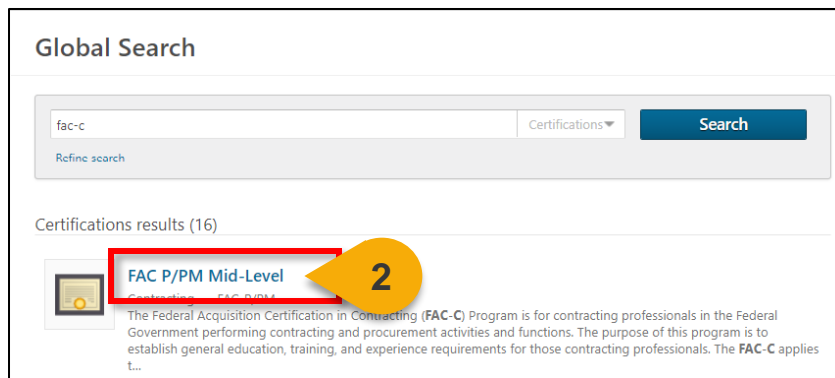
# Assign Certifications

*When you want to assign a certification to your subordinates....*

**Step 1:** Search for the certification you would like to assign using Global Search, which is located at the upper right-hand corner of the page.



**Step 2:** Click on the **title** of the certification you'd like to assign.



**Step 3:** Click **Assign**.



# Assign Certifications (Cont.1)

**Step 4:** Enter any comments as needed in the **Comment Box**.

The screenshot shows a web form titled "Assign Certification". Below the title is a blue header bar. Underneath is a gold medal icon followed by the text "FAC P/PM Mid-Level". Below this is a breadcrumb trail: "Certification | Contracting | FAC-P/PM". A paragraph of text describes the FAC-C program. Below the text is a section labeled "COMMENTS" with a large, empty text box. A yellow callout bubble with the number "4" points to the text box. A red rectangle highlights the text box.

**Step 5:** Select the subordinates you want to assign the certification to by clicking the **checkbox** next to their name. You can assign to both direct and indirect subordinates.

**Step 6:** Click **Submit**.

The screenshot shows the "DIRECT SUBORDINATES" section of the form. It has a header "DIRECT SUBORDINATES" in a grey bar. Below is a table with a checkbox and the name "Name". The first row has a checkbox and the name "F". A yellow callout bubble with the number "5" points to the checkbox. A red rectangle highlights the checkbox. Below the table is a section labeled "INDIRECT SUBORDINATES" with a blue link "Indirect Subordinates". At the bottom is a "Submit" button. A yellow callout bubble with the number "6" points to the button. A red rectangle highlights the button.



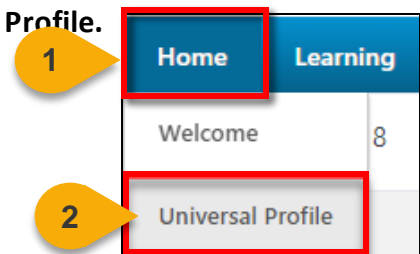
# Checklists and Forms



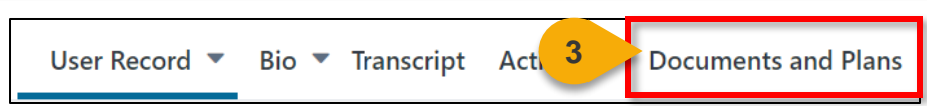
# View Submitted Forms

*When you want to see the forms you've submitted...*

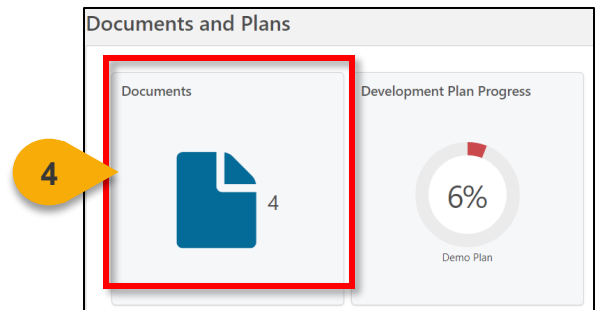
**Steps 1 & 2:** Hover over **Home** and click **Universal Profile**.



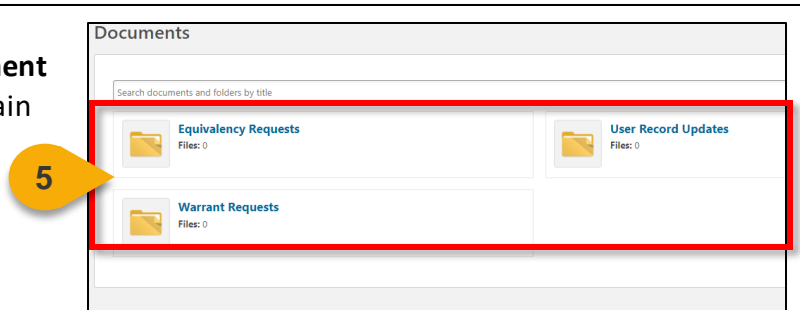
**Step 3:** Click on **Documents and Plans**.



**Step 4:** On the Documents and Plans page, click **Documents**.



**Step 5:** On the Documents page, you view your **document folders** and see which contain files.



**Equivalent Requests:**  
Contains  
Equivalent/Fulfillment  
Forms you have submitted.

**Warrant Requests:**  
Contains Warrant Forms  
you have submitted.

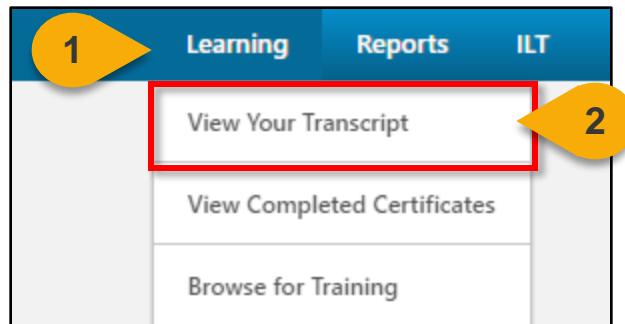
**User Record Updates:**  
Contains User Record  
Update Forms you have  
submitted.

# Request Education/Experience Verification

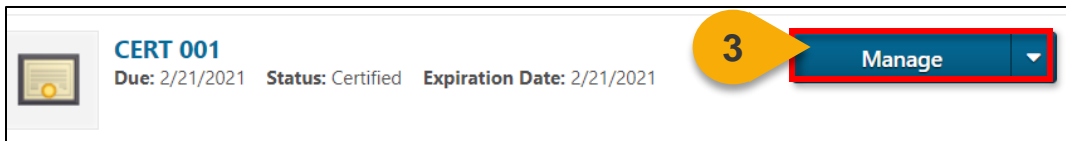
*When you need to submit an Education or Experience Verification Checklist for a Certification...*

Experience and Education Verification Checklists are used to validate experience and education requirements for Certifications.

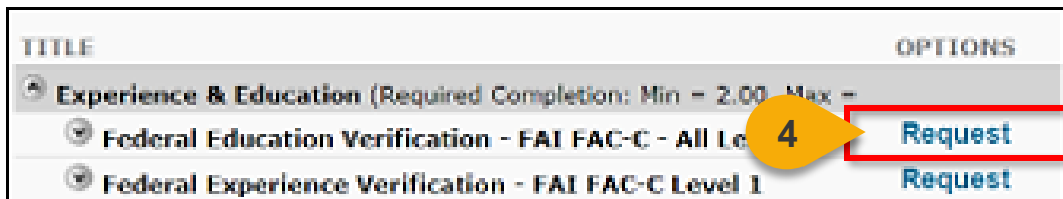
**Steps 1 & 2:** Hover over the **Learning** tab and click **View Your Transcript**.



**Step 3:** Click **Manage** next to the certification that you've completed.



**Step 4:** Scroll down until you see Experience and/or Education Verification and click **Request**.



# Request Education/Experience Verification (Cont.1)

**Step 5:** After you click on Request. A popup will appear, click **Request** again.

**Federal Education Verification - FAI FAC-C - All Levels**

Observation Checklist

Details

Description: Please follow the instructions below to attach documents for this requirement.

1. Click the **Attachments** tab
2. Choose the file you wish to upload.
3. Click **Add**. You can upload up to 3 files.

**5** **Request** **Close**

**Step 6:** Click on **View Checklist**.

**CERTIFICATION**

**TITLE**

**Options**

**6** **View Checklist**

**Step 7:** Click on **Checklist Summary** to view the overall progress of any checklists associated with a certification.

**My Checklists**

Birdie Winters

**7** **Checklist Summary**

**Checklist Summary**

Overall Progress **All Competencies**

☐ Show Completed

Name	Status	Rating/Score	Progress
Federal Experience Verification - FAI FAC P/PM Entry Level	Not Started	-	0%
Federal Experience Verification - FAI FAC P/PM Senior Level	Not Started	-	0%

# Request Education/Experience Verification (Cont.2)

**Step 8:** Click on **Federal Education/ Experience Verification** to view instructions for the checklist.



Checklist Summary

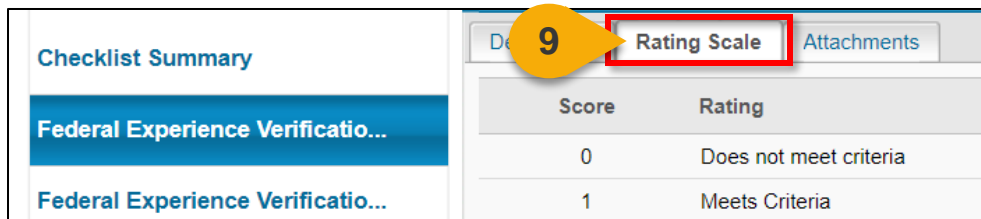
Federal Experience Verification...

Checklist Summary

Federal Education Verification...

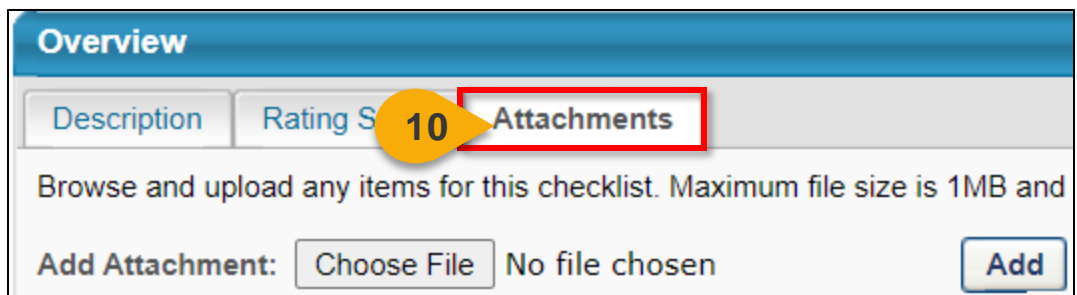
8

**Step 9:** Click on the **Rating Scale** tab to view the rating scale for the checklist.



Score	Rating
0	Does not meet criteria
1	Meets Criteria

**Step 10:** Click on the **Attachments** tab to upload any necessary documents for the checklist verifier to review.



Overview

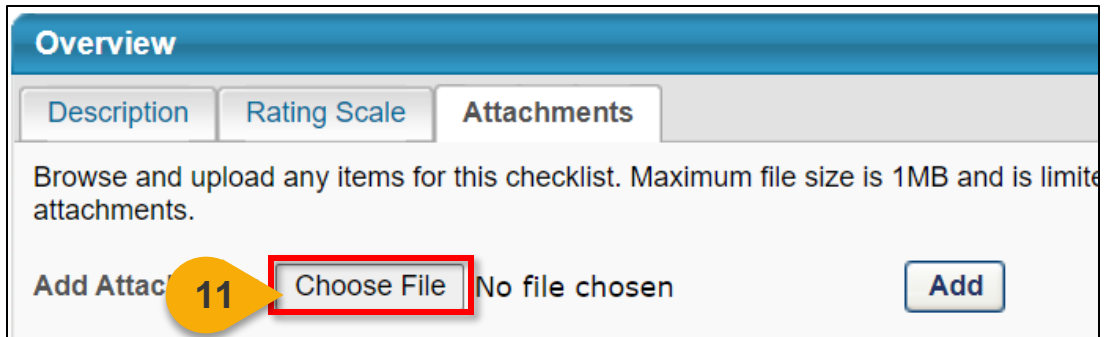
Description Rating Scale Attachments

Browse and upload any items for this checklist. Maximum file size is 1MB and

Add Attachment: Choose File No file chosen Add

# Request Education/Experience Verification (Cont.3)

**Step 11 :** Click **Choose File** to add a copy of your resume or other relevant documents.



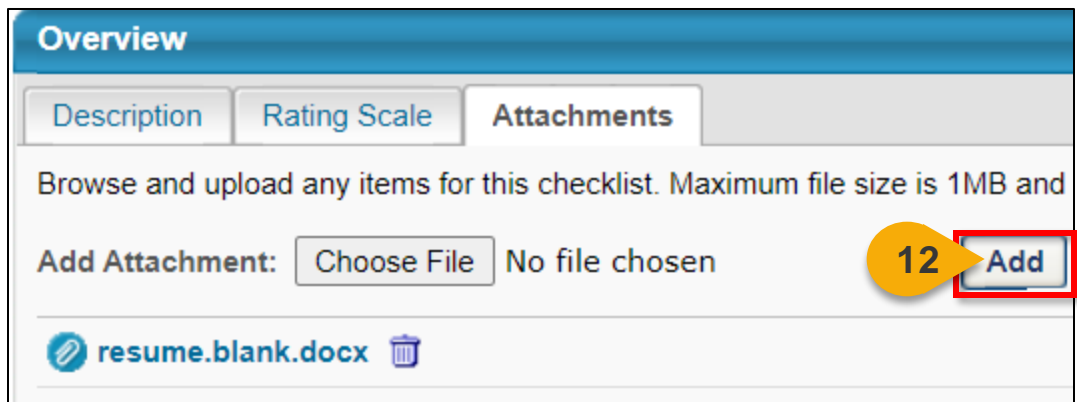
**Overview**

Description Rating Scale Attachments

Browse and upload any items for this checklist. Maximum file size is 1MB and is limited to 3 attachments.

Add Attachment: **11** Choose File No file chosen Add

**Step 12 :** After you select the file, click **Add** to add the file to your Checklist.





**Overview**

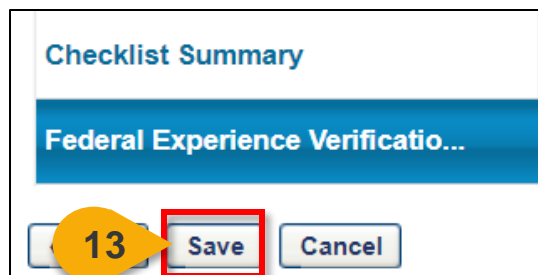
Description Rating Scale Attachments

Browse and upload any items for this checklist. Maximum file size is 1MB and is limited to 3 attachments.

Add Attachment: Choose File No file chosen **12** Add

 resume.blank.docx 

**Step 13:** Once all the desired attachments have been added (up to 3), click **Save**. The Checklist will be routed for approval.



**Checklist Summary**

Federal Experience Verification...

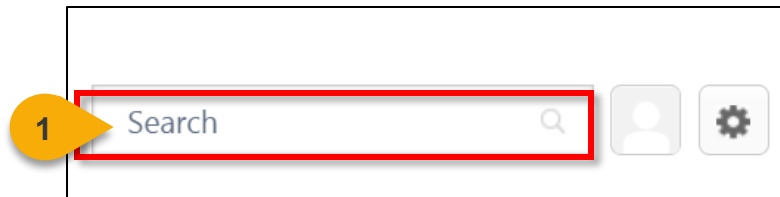
**13** Save Cancel

# Submit an Equivalency/Fulfillment Form

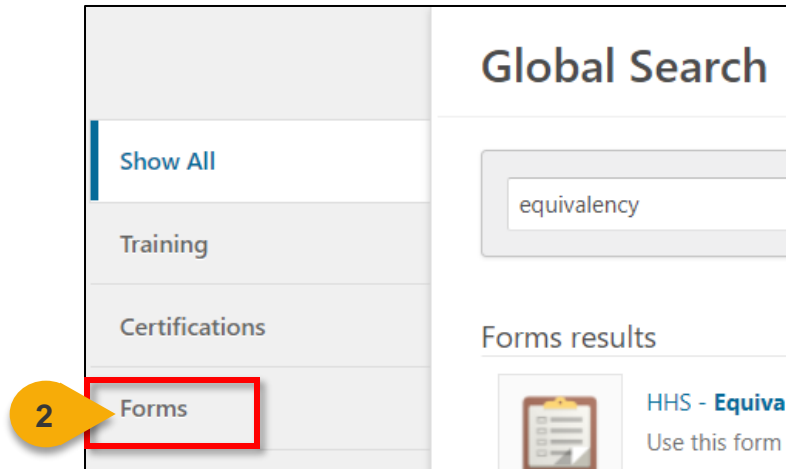
*When you want to request Equivalency or Fulfillment for a Course...*

**Use Global Search to find the Equivalency/Fulfillment form.**

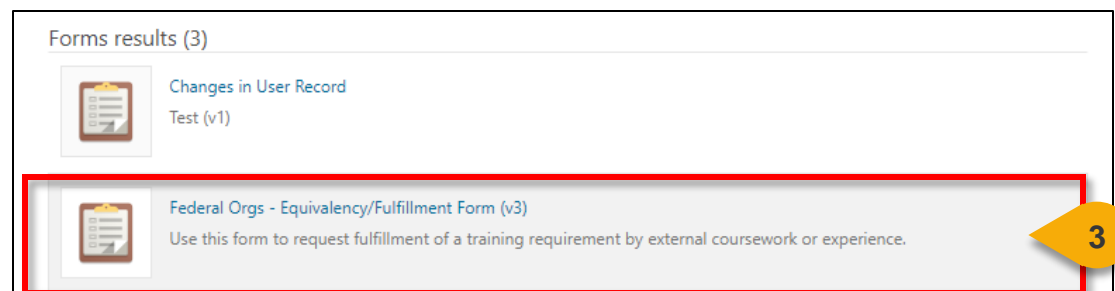
**Step 1:** Enter **Equivalency** in the Search box and click the Magnifying Glass.



**Step 2:** Click on **Forms**.



**Step 3:** Click on the **Equivalency/Fulfillment Form** for your agency.





# Submit an Equivalency/Fulfillment Form (Cont.1)

**Step 4:** Select the **dropdown arrow** to choose the course for which you would like an equivalency.


**Equivalency & Fulfillment Request**  
Please provide the information below to indicate how you have fulfillment requirements for course equivalency.


**Please Select the Course You Would Like Equivalency For**


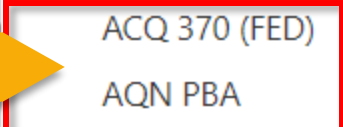
Select  

**Step 5:** Select the **course** from the dropdown menu.

**Please Select the Course You Would Like E**

Select 

✓ Select 


 

ACQ 370 (FED)  
AQN PBA



**Step 6:** If the course you are trying to request an equivalency for is not available, you can enter it in the **Other** textbox.

**Equivalency & Fulfillment Request**  
Please provide the information below to indicate how you have

**Please Select the Course You Would Like Equivalency For**

Select 

**If You Selected "Other", Please List.**




# Submit an Equivalency/Fulfillment Form (Cont.2)

**Step 7:** Click the **calendar** icon to enter the Training Start and End dates.


**7**

**Training Start Date:**



Select the equivalent training start date.


**Training End Date:**



Select the equivalent training end date.

**Step 8:** Click **Select File** to add any supporting documentation.

If Requesting Course Equivalency, Attach Course Completion Certificate Here.

Drag and drop file **8** 


**Step 9:** Enter any supporting comments in the **Employee Remarks** field.

**9**

**Employee Remarks:**

2000 characters maximum.

**Step 10:** Click **Submit for Approval** to route to Equivalency and Fulfillment Approvers.

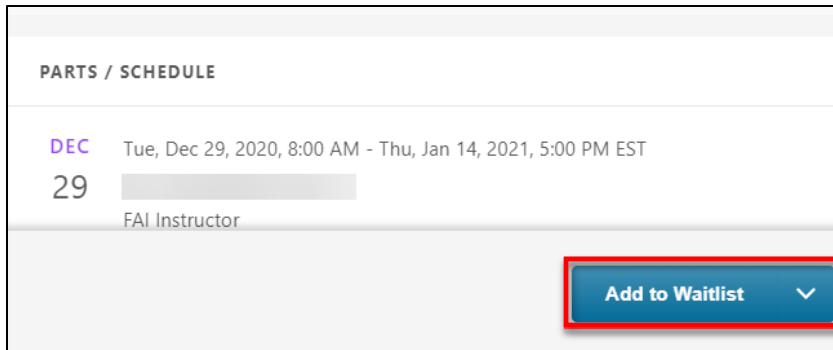
**10** 

# Submit an Exception Request

*When you want to submit an Exception Request for a course prerequisite...*

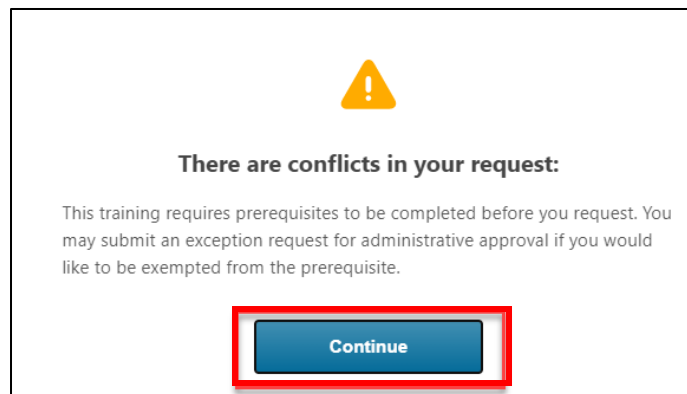
You will submit an Exception Request when you would like to register for a Session that has a prerequisite requirement that you do not meet. If granted, this request will allow you attend the course without having the prerequisite on your Transcript.

**Step 1:** Select the Session you would like to join and click **Add to Waitlist or Request**.



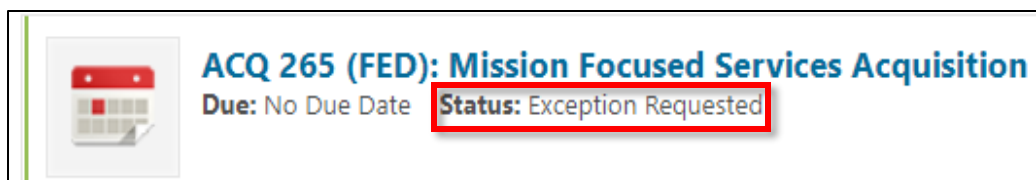
The screenshot shows a section titled "PARTS / SCHEDULE". Below the title, there is a date "DEC 29" and a time range "Tue, Dec 29, 2020, 8:00 AM - Thu, Jan 14, 2021, 5:00 PM EST". Below the time range, it says "FAI Instructor". At the bottom right, there is a blue button labeled "Add to Waitlist" with a dropdown arrow, which is highlighted with a red box.

**Step 2:** A Warning will pop-up. Select **Continue** to submit an Exception Request.



The screenshot shows a warning message with a yellow triangle icon containing an exclamation mark. The text reads: "There are conflicts in your request: This training requires prerequisites to be completed before you request. You may submit an exception request for administrative approval if you would like to be exempted from the prerequisite." At the bottom, there is a blue button labeled "Continue", which is highlighted with a red box.

**Step 3:** The status for the session will change to **Exception Requested** on your transcript.

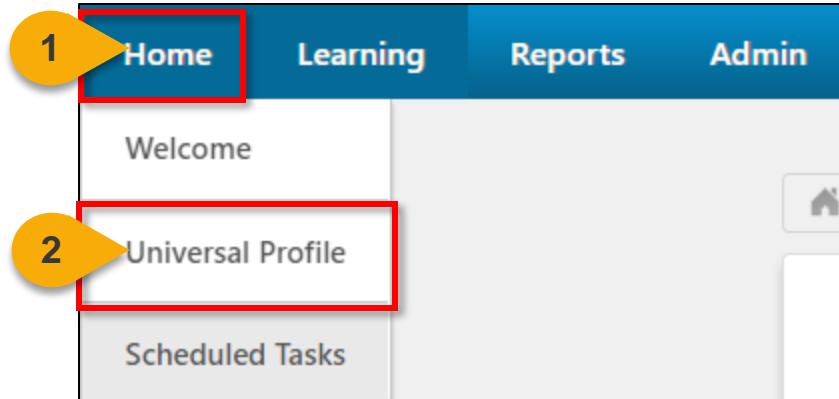


The screenshot shows a transcript entry for "ACQ 265 (FED): Mission Focused Services Acquisition". To the left of the text is a calendar icon. Below the title, it says "Due: No Due Date" and "Status: Exception Requested". The "Status: Exception Requested" text is highlighted with a red box.

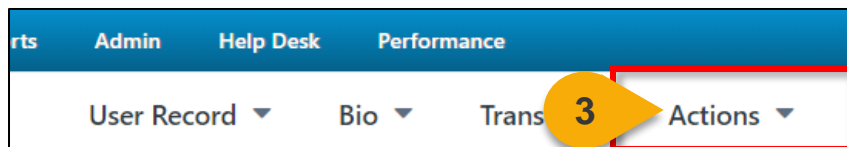
# Approve/Deny/Return a Warrant Application

*When you want to approve, deny, or return a Warrant Application ...*

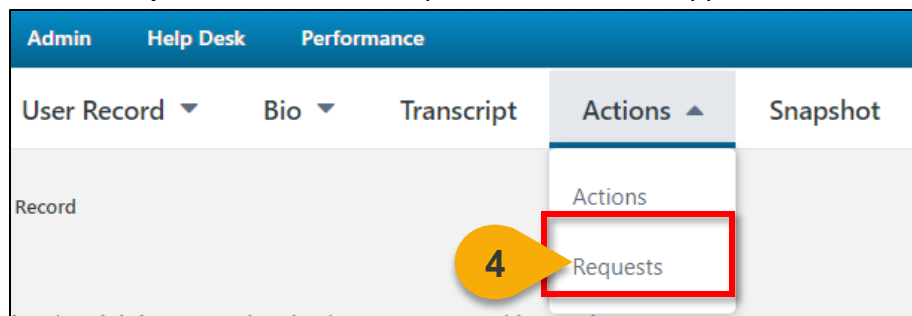
**Steps 1 & 2:** Navigate to **Home > Universal Profile**.



**Step 3:** Click the **Actions** tab to view the dropdown.

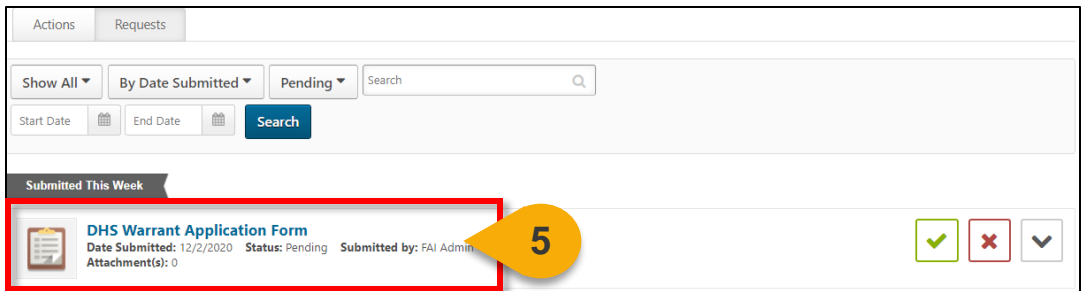


**Step 4:** Click the **Requests** to view the requests available for approval.



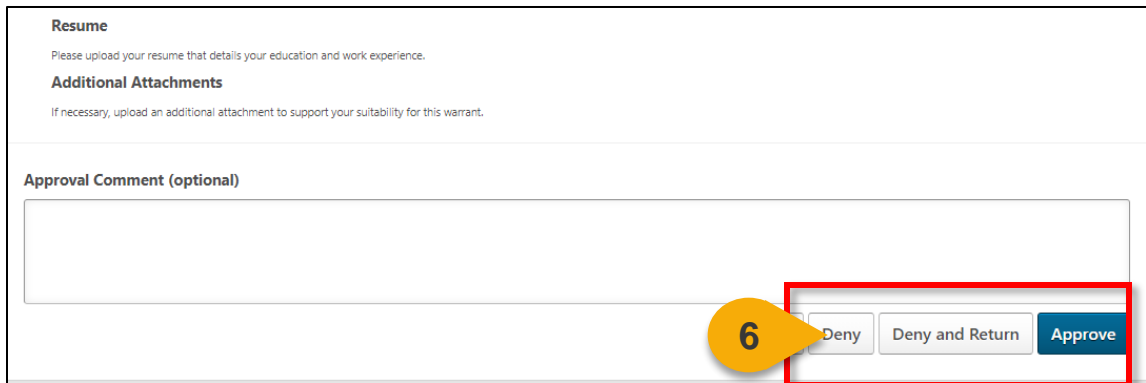
# Approve/Deny/Return a Warrant Application (Cont.1)

**Step 5:** Click the **Warrant Application** title to view the submission.



The screenshot shows a web interface for managing warrant applications. At the top, there are tabs for 'Actions' and 'Requests'. Below these are filters for 'Show All', 'By Date Submitted', 'Pending', and a search bar. A 'Submitted This Week' section is highlighted. A table lists applications, with the first entry 'DHS Warrant Application Form' highlighted by a red box. A yellow callout bubble with the number 5 points to this entry. The entry details include 'Date Submitted: 12/2/2020', 'Status: Pending', 'Submitted by: FAI Admin', and 'Attachment(s): 0'. To the right of the entry are three buttons: a green checkmark, a red X, and a downward arrow.

**Step 6:** Review the information. At the bottom of the form, click **Deny**, **Deny and Return**, or **Approve** as appropriate.



The screenshot shows the details of a warrant application. It includes sections for 'Resume' (with a prompt to upload a resume), 'Additional Attachments' (with a prompt to upload additional attachments), and 'Approval Comment (optional)' (with a text area). At the bottom right, a red box highlights three buttons: 'Deny', 'Deny and Return', and 'Approve'. A yellow callout bubble with the number 6 points to these buttons.

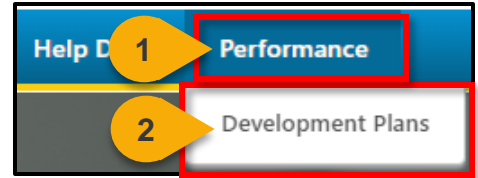
# Individual Development Plans



# Create an IDP

*When you want to create an IDP...*

**Steps 1 & 2:** Hover over **Performance** and click on **Development Plans**.



**Step 3:** Click on the **Create New Plan** button.



**Step 4:** Add a **Plan Title** and **Description** to your IDP.

A screenshot of the 'Create a Plan' form. The breadcrumb trail at the top reads 'Home > Snapshot > Dev Plan List > Create a Plan'. The main heading is 'Create a Plan'. Below it is a section titled 'General Information'. There are two input fields: 'Plan Title\*' and 'Description'. The 'Plan Title\*' field contains the text 'Management and Leadership Development'. The 'Description' field contains a rich text editor with a toolbar and the text: 'Develop skills in the areas of program management and task delegation in order to improve leadership skills. This will be done by: - Shadowing Senior Associates - Taking internal and external training courses on mangement and leadership skills - Joining efforts on the job that allow for demonstration of program management'. A yellow callout bubble with the number '4' points to both the 'Plan Title\*' and 'Description' fields. Both fields are highlighted with a red rectangular border.

**Step 5:** Click on the **Add Objective** button in the Development Objectives section.

A screenshot of the 'Development Objectives' section. It has a light gray background with the heading 'Development Objectives'. Below the heading is a blue icon of a document with a plus sign. Below the icon is the text: 'There are no development objectives. Would you like to add one?'. At the bottom right, there is a blue button labeled 'Add Objective'. A yellow callout bubble with the number '5' points to this button. The button is highlighted with a red rectangular border.

# Create an IDP (Cont. 1)

## Step 6: Enter an **Objective Title**.

### Add Development Objective

Development Objectives represent what you need to learn or do in order to complete your development plan.

Objective Title

What skills would you like to develop?

6

## Step 7: Select a category from the **Category** dropdown.

### Add Development Objective

Development Objectives represent what you need to learn or do in order to complete your development plan.

Objective Title

What skills would you like to develop?

Category

Development Objectives

7

## Step 8: Add **Development Actions**. Under Learning and Development there are three options you can utilize to add training/development actions to your Objective: **Search for Training**, **Browse Recommended**, and **Add Development Action**.

### Learning and Development

8

Search For Learning

Find learning opportunities to help you achieve your objective.

Browse Recommended

Browse learning and development actions that are recommended for you.

Add Development Action

Create your own actions to make your objective happen.

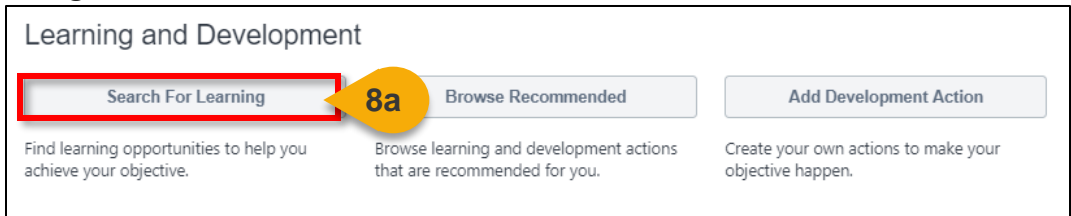
**Search for Learning:**  
Encompasses training sessions provided. It allows you to select online sessions.

**Browse Recommended:**  
Allows you to select learning and development courses.

**Add Development Action:**  
Free text that allows you to add any external training or action item you wish to include in order to develop yourself professionally.

# Create an IDP (Cont. 2)

**Step 8a:** To add training courses available online in Cornerstone, click on **Search For Learning**.

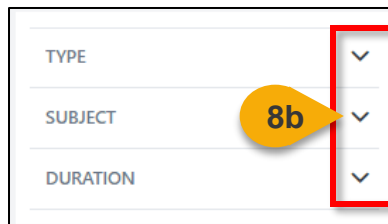


Learning and Development

**Search For Learning** 8a Browse Recommended Add Development Action

Find learning opportunities to help you achieve your objective. Browse learning and development actions that are recommended for you. Create your own actions to make your objective happen.

**Step 8b:** All the available courses will be displayed on the screen. To filter the results displayed, click on the **arrows next to the filter options** to the left of the page.

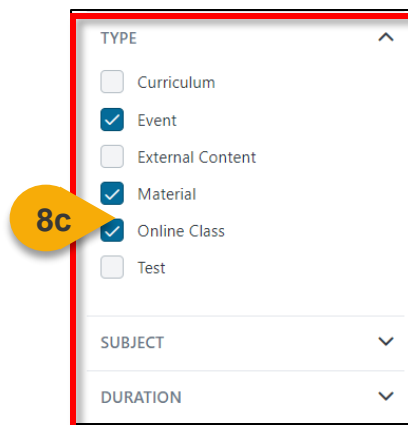


TYPE SUBJECT DURATION

8b

**Step 8c:** The filter options will expand on the screen. Select the filter you wish to apply by clicking on the **checkboxes** next to each option.

The results will be updated on the screen based on the filters you select.



TYPE ^

☐ Curriculum

☒ Event

☐ External Content

☒ Material

☒ Online Class

☐ Test

SUBJECT ^

DURATION ^

8c



# Create an IDP (Cont. 3)

**Step 8d:** You may also search for a specific training course using the **Search bar**.

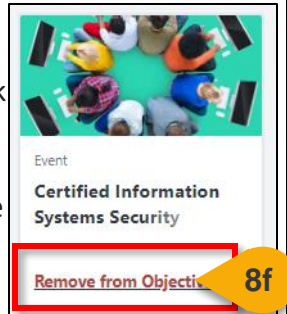
8d

Search For Learning

**Step 8e:** Select the **Add to Objective** link beneath any training you want to add. Multiple training courses can be selected.



**Step 8f:** If you change your mind, simply click on **Remove from Objective** and the course will be removed from your IDP.



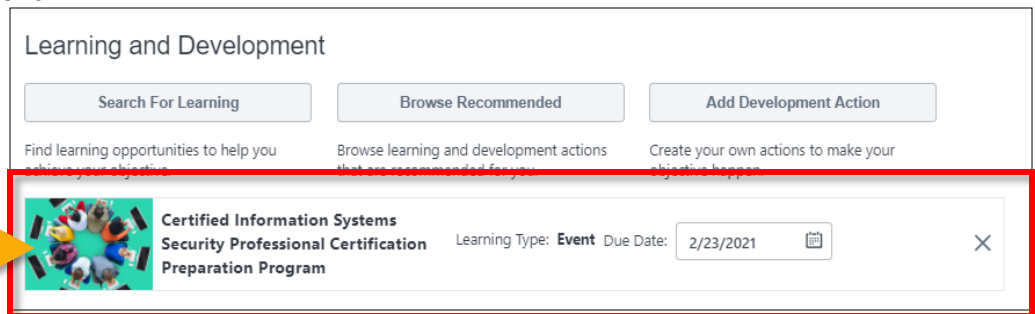
**Step 8g:** Once you are done selecting the training courses to be added to your Objective, click **Return to Objective** at the bottom of the page.

8g

Return to Objective

**Step 8h:** The course(s) selected will appear on the main **Objective** screen. By default, the training due date is set up to be due 6 months from now, but this date is editable. Notice that the training can be removed from your Objective by clicking on the **X** icon next to it.

8h



# Create an IDP (Cont. 4)

**Step 9a:** To add action items not in the CSOD catalog to your IDP Objective, click on **Add Development Action**.

Learning and Development

<b>Search For Learning</b>	<b>Browse Recommended</b>	<b>9a</b> <b>Add Development Action</b>
Find learning opportunities to help you achieve your objective.	Browse learning and development actions that are recommended for you.	Create your own actions to make your objective happen.

**Step 9b:** A pop-up window will appear on the screen. You must add a description to your development action in the **Description** field.

**Development Action**

**9b** Description\*

**Step 9c:** Select the **activity type** from the Activity Type dropdown menu.


Activity Type

**9c** Select...  
Outside Training  
Additional Learning  
Coaching/Mentoring  
On the Job  
Reading  
Shadowing

**Step 9d:** Confirm the due date for the development item. By default, the due date is set up to be due 6 months from when you first create this item. To change the due date, click on the **calendar icon** in the Due Date field, or simply type in the date.

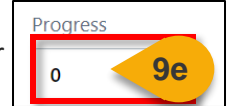
Due Date\*

2/23/2021

**9d** 

# Create an IDP (Cont. 5)

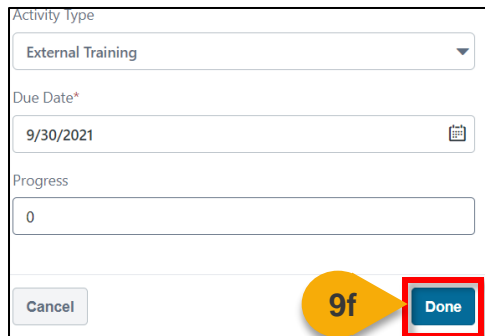
**Step 9e:** Update the **Progress** you have made as applicable. This is a percentage, but you don't need to type "%", just the number, e.g., for 25%, type in "25".



Progress

0

**Step 9f:** Click **Done** to add the activity to your IDP.



Activity Type

External Training

Due Date\*

9/30/2021

Progress

0

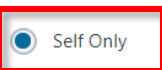
Cancel Done

**Step 10:** Under Assignment, select **Self Only** to assign this IDP to yourself. If you are a Supervisor, you can assign this IDP to your employees. To assign IDPs to employees, view the Manager task aids.

## Assignment

Select the criteria that defines who will be included in this assignment

10



☒ Self Only

**Step 11:** To assign this IDP as your primary IDP (you can have multiple IDPs), check the box next to **Designate this as the Primary Plan for assignees**.

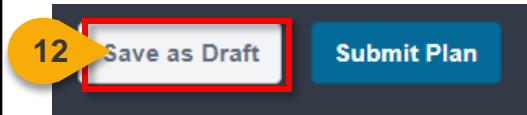
11



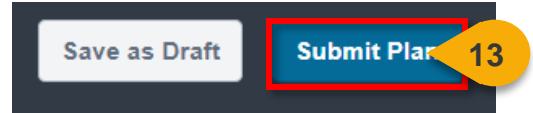
☒ Designate this as the Primary Plan for assignees

# Create an IDP (Cont. 6)

**Step 12:** To save the plan as a draft and return to it later, click **Save as Draft**.



**Step 13:** To submit the plan for Manager approval, click **Submit Plan**.

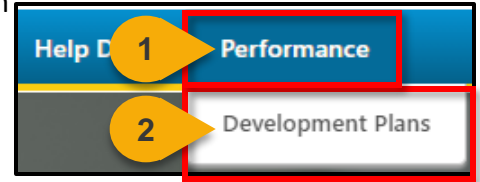


Primary IDPs should be utilized as the main formal development plan for the employee. However, if the Employee would like to have other secondary development plans, they can create more IDPs, which will be listed under Other Plans.

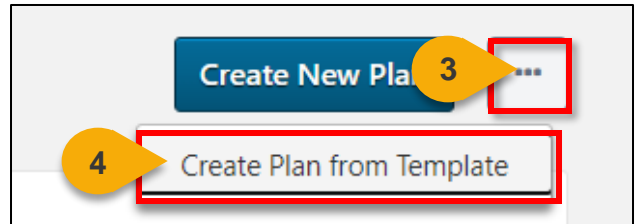
# Create an IDP from a Template

*When you want to create an IDP using a template...*

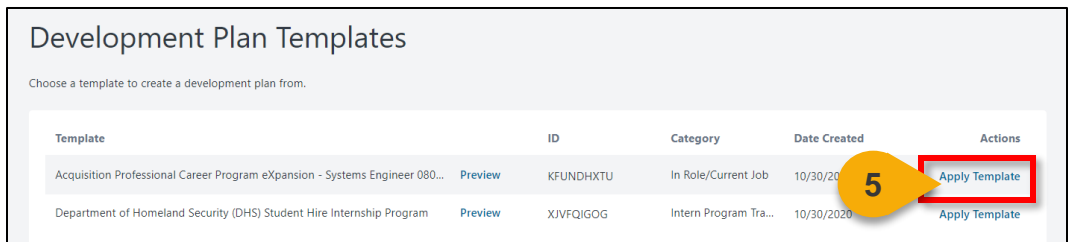
**Steps 1 & 2:** Hover over **Performance** and click on **Development Plans**.



**Steps 3 & 4:** Click on the **ellipsis** and then choose **Create Plan from Template**.



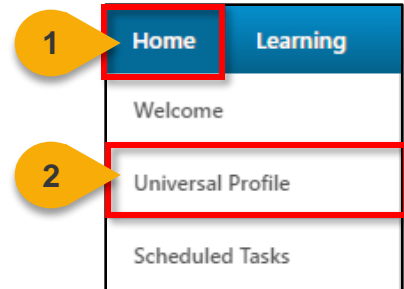
**Step 5:** Select the template you want to use and click **Apply Template**. You can edit the template or submit it for approval as-is.



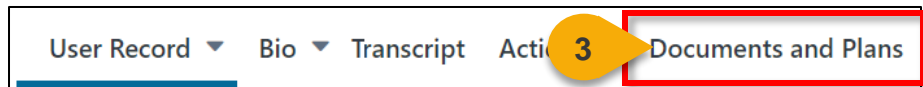
# Update IDP

*When you want to update an IDP Objective, Training or Action Step...*

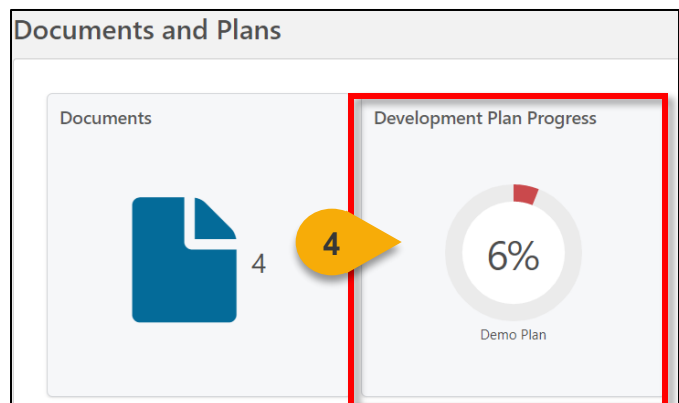
**Steps 1 & 2:** Hover over **Home** then navigate to **Universal Profile**.



**Step 3:** Click on the **Documents and Plans** tab.



**Step 4:** Click on the **Development Plan Progress** widget.

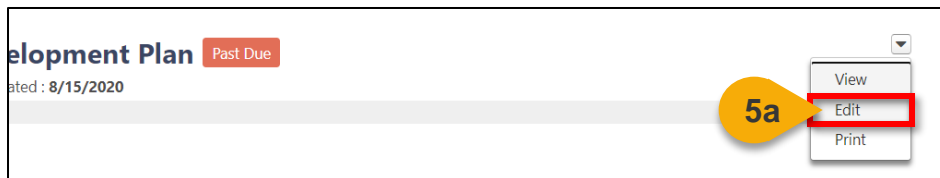


**Note:** You can also navigate to the IDP using the Performance tab and then clicking on Development Plans.

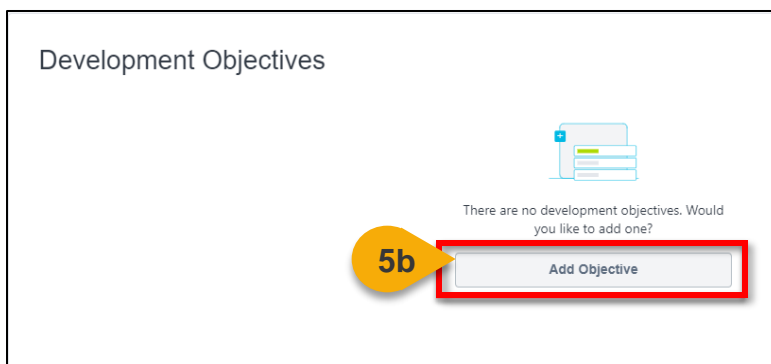
# Update IDP (Cont. 1)

If you wish to add a new Objective to your IDP, follow steps 5a – 5b below.

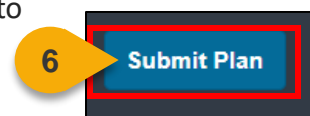
**Step 5a:** Select the dropdown icon **Edit** option next to the IDP to which you want to add a new Objective.



**Step 5b:** Click on the **Add Objective button** and create the new Objective (see Creating IDPs task aid for further assistance).



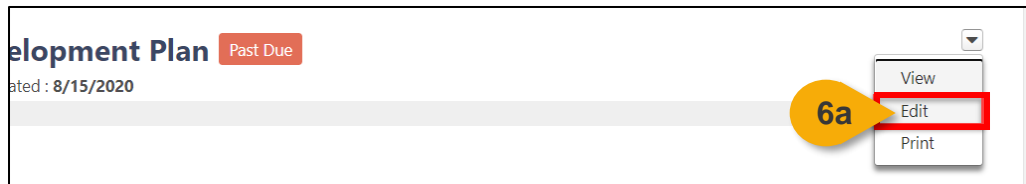
**Step 6:** Click on the **Submit Plan** button when you are ready to resubmit your plan for approval.



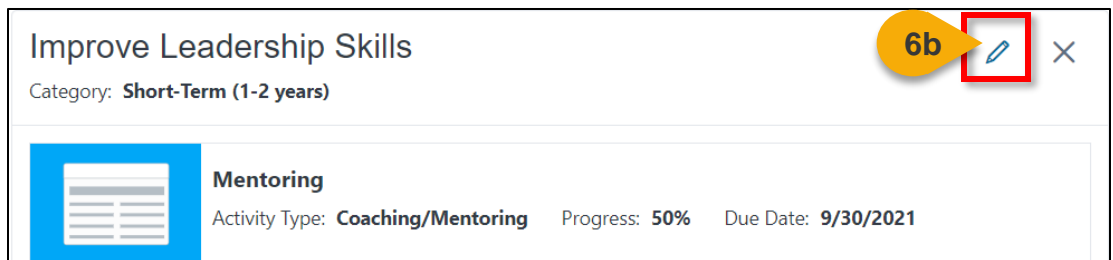
# Update IDP (Cont. 2)

If you only wish to update a Training or Action Step on an Objective in your IDP, follow the steps 6a – 6g on the following pages.

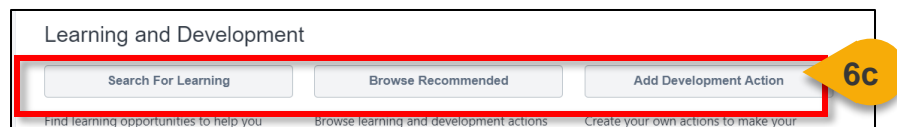
**Step 6a:** Select the dropdown icon **Edit** option next to the plan with the Objective you want to update.



**Step 6b:** Select the **Edit** icon next to the Objective for which you want to update Training or Actions Items.



**Step 6c:** To add training or Development Actions, choose from the options within **Learning and Development**.








# Update IDP (Cont. 3)

**Step 6d:** You can edit Development Actions by clicking on the **Edit** icon next to it. When in editing mode, you can update anything in the Development Action, including its progress. You can only cancel IDPs after they've been approved.

Learning and Development

Search For Learning Browse Recommended Add Development Action

Find learning opportunities to help you achieve your objective. Browse learning and development actions that are recommended for you. Create your own actions to make your objective happen.





 **Attend Leadership Conference in San Diego, CA** Activity Type: **Outside Training** Progress: **0%** Due Date: **2/23/2021**   **6d**

**Step 6e:** For training courses that are NOT Development Actions, you may update the due date by clicking on the **Due Date field** or delete it by clicking on the **X icon** next to it. Training course completions will be updated automatically as you complete these training courses on your transcript.

Learning and Development

Search For Learning Browse Recommended Add Development Action

Find learning opportunities to help you achieve your objective. Browse learning and development actions that are recommended for you. Create your own actions to make your objective happen.

 **Attend Leadership Conference in San Diego, CA** Activity Type: **Outside Training** Progress: **6e** **2/23/2021**   

**Step 6f:** Once all the changes have been made to your IDP's Objective, click on the **Save and Return to Plan**.

**6f** **Save and Return to Plan**

**Step 6g** When ready, click **Submit Plan** to resubmit the IDP for approval.

**6g** **Submit Plan**

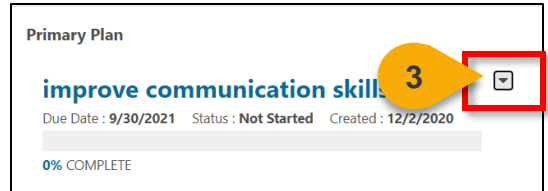
# Cancel IDP

*When you want to cancel an IDP...*

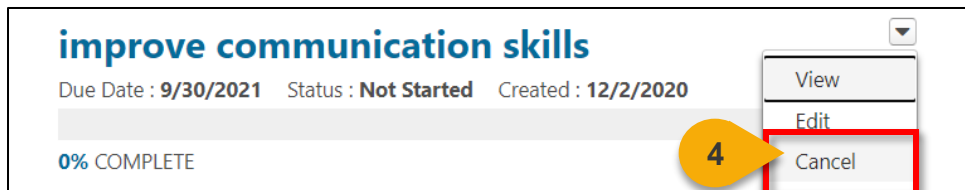
**Steps 1 & 2:** Hover over the **Performance** tab and then click **Development Plans**.



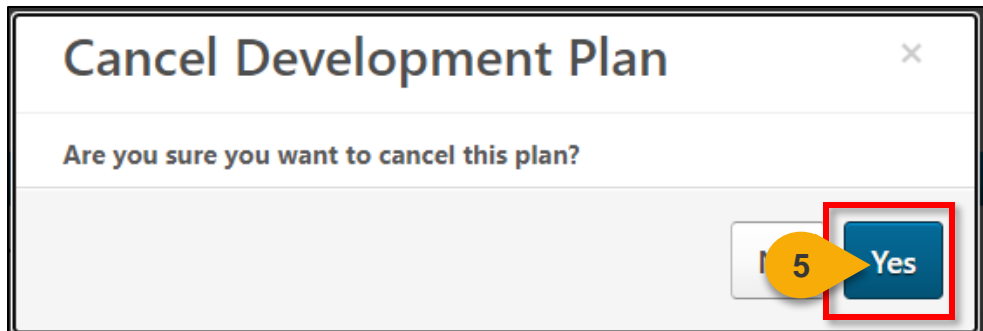
**Step 3:** Click the **dropdown arrow** next to the plan you would like to cancel.



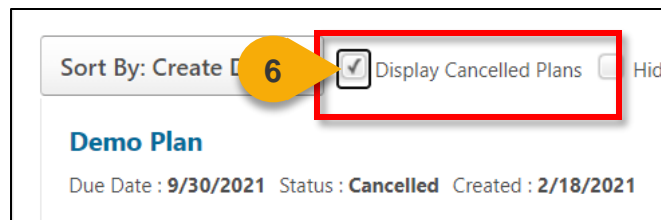
**Step 4:** Select **Cancel** from the dropdown menu.



**Step 5:** A popup will appear. Select **Yes** to cancel the IDP.



**Step 6:** Click the **checkbox** for Display Cancelled Plans to view the IDP you cancelled.



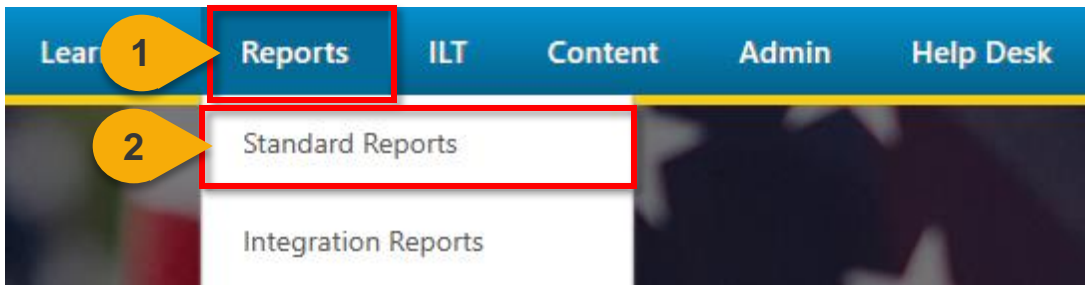
# Reports



# View Standard Reports

*When you want to view Standard Reports...*

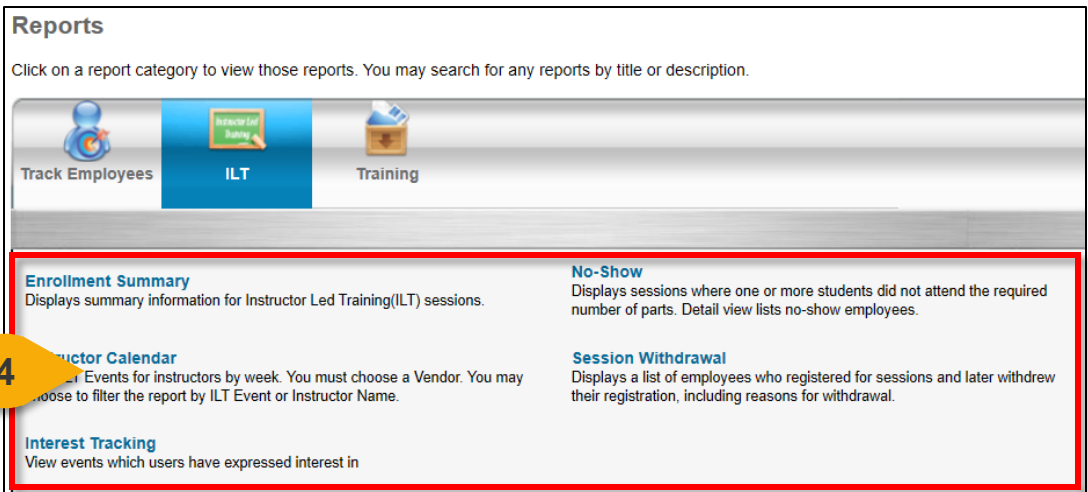
**Steps 1 & 2:** Hover over the **Reports** tab and then click **Standard Reports**.



**Step 3:** Choose the **Report Category**.



**Step 4:** Select the type of report you would like to view by clicking on the **name of the report**.



# View Standard Reports (Cont.1)

**Step 5:** Enter data into the **filters** you would like to apply to the report. The filters available will vary depending on the report selected. The system will alert you if you try to run a Standard Report with required fields missing.



**Enrollment Summary**  
View summary information for Instructor Led Training (ILT) sessions.


**Date Filters**



Date Criteria:  From:  To:



**Advanced Filters**

5




Facility :   

Vendor :  

Instructor :   (Please Select Vendor First) 

Event :   

Locator Number :

 [Printable Version](#)  [Export to Excel](#)  [Export to Text](#)

**Step 6:** Choose how you would like the report to export: **Printable Version**, **Export to Excel**, or (when available), **Export to Text**. The file will download to your computer.



**Enrollment Summary**  
View summary information for Instructor Led Training (ILT) sessions.


**Date Filters**



Date Criteria:  From:  To:



**Advanced Filters**

6




Facility :   

Vendor :  

Instructor :   (Please Select Vendor First) 

Event :   

Locator Number :

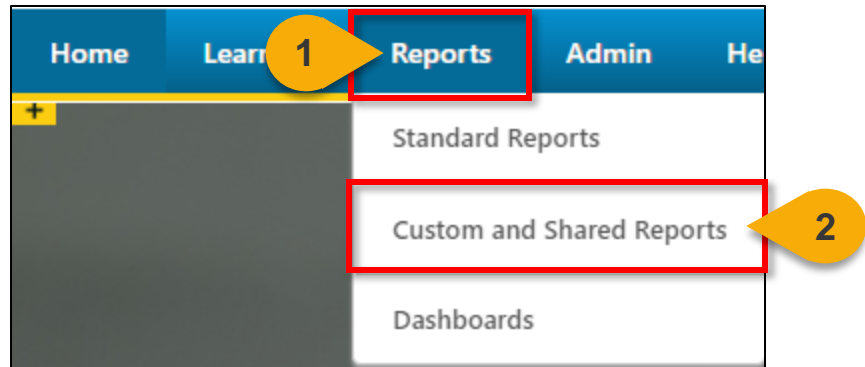
 [Printable Version](#)  [Export to Excel](#)  [Export to Text](#)

Note: Click “Yes” to open the Excel option after the download has completed.

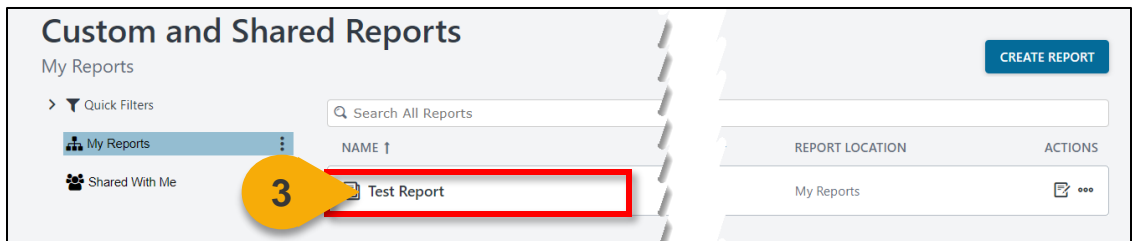
# View Custom Reports

*When you want view custom or shared reports...*

**Steps 1 & 2:** Navigate to **Reports**, then select **Custom and Shared Reports**.

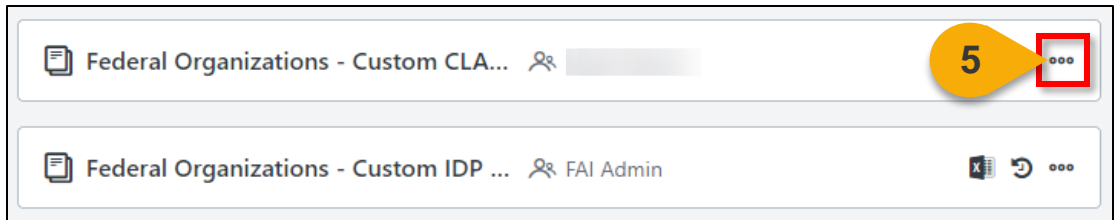


**Step 3:** You will arrive at the Custom and Shared Reports page. Here you will see all custom reports that you have created. Click on the **title** of the report to view it.

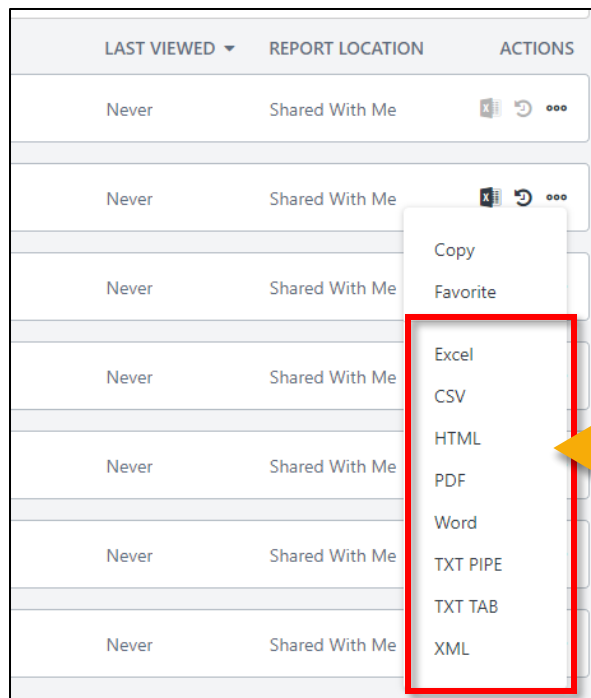


# View Custom Reports (Cont.1)

**Step 5:** To see other report format options, click the **ellipses (...)** icon.



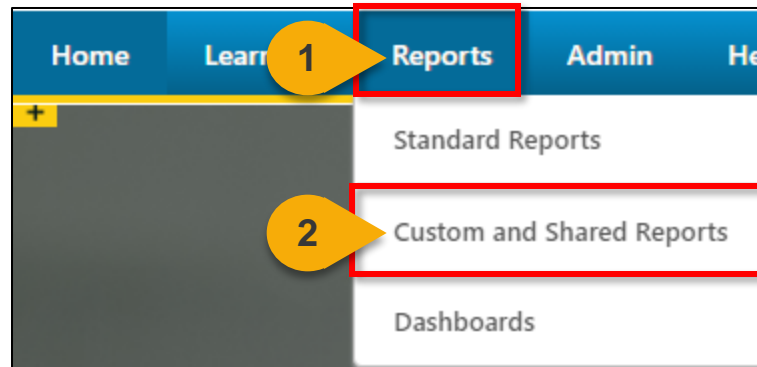
**Step 6:** Click the **file format** you wish to download. It will download to your computer.



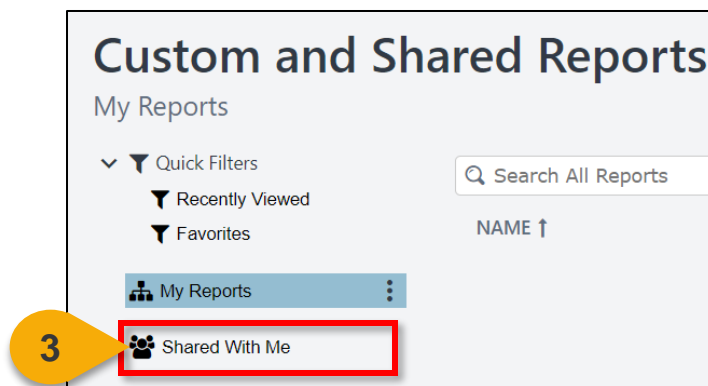
# Filter and Download Custom Reports

*When you want to filter and download a report...*

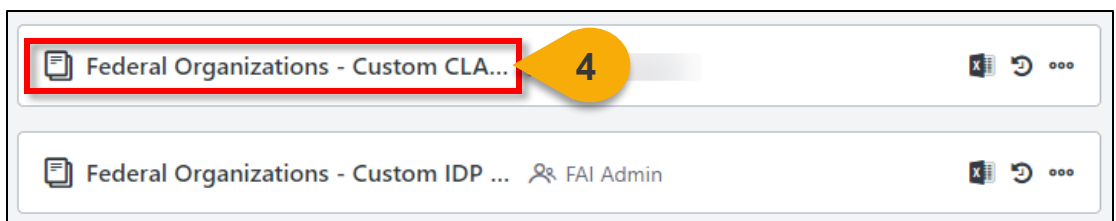
**Steps 1 & 2:** Navigate to the **Reports** tab and then select **Custom and Shared Reports**.



**Step 3:** On the left-hand side of the screen, click **Shared With Me** to see reports that have been shared with you.



**Step 4:** Click the **Report Name** you want to view to update the report filters.





# Filter and Download Custom Reports (Cont. 1)

**Step 5:** Update the **filters** as needed. The filters will vary based on the report.

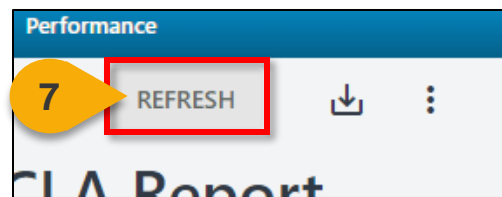
▼ Filters

6 Certifications - Certification Category is equal to FAC-C Continuous Learning

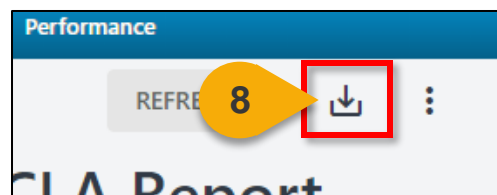
AND Certifications - Certification User Status is one of Select...

Calculated Fields - Days Until Certification Period Due is greater than 0

**Step 7:** Click **Refresh** in the top right corner to see a sample of the newly-filtered report on the bottom portion of the page.



**Step 8:** Click the **Download Options** icon in the top right corner to see the formats available for this report.



**Step 9:** Choose the **File Format** in which you would like to download the report. The report will download to your computer.

